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PRE-BID INTELLIGENCE

TENDER INSIGHT

AI-Driven Generative Report-Writer & Document Automation

SOLICITATION	RFP_F-CONTR-0000000220
AWARDING BODY	Contra Costa County, California
DEPARTMENT	Probation Dept · Purchasing Services
DATE PREPARED	May 6, 2026

Prepared for: US Prime and Offshore Support Team · Confidential Pre-Bid Use

TENDER INSIGHT BY SYBRID

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Section 1: Procurement Office Intelligence

Contra Costa County Purchasing Services runs a standardized procurement operation using the county's L-5 General Conditions template, unchanged since its 2014 revision. That template uniformity tells you this office values consistency and process compliance over flexibility. When they say a proposal must be submitted electronically, with no exceptions, they mean it. When they say late submittals will not be accepted, they mean that too. This is not an office that makes accommodations for vendors who phone in at 3:01 PM on May 29 with a technical excuse.

The lead buyer, Des Gebre, is identified as Sr. Buyer at Purchasing Services. The protest manager, Cindy Shehorn, holds the Purchasing Manager title. The Department Head of Probation is not named in the solicitation, this matters because Section 9 of the General Conditions assigns dispute resolution authority to 'the head of the county department for which this Contract is made, or his designee.' For this contract, that means the Chief Probation Officer or their designee makes the final call on any disagreement about scope or performance. The Purchasing office runs the process; the Probation Department owns the outcome.

The evaluation committee structure is not named. The solicitation states proposals are assessed by 'a designated committee.' Based on the evaluation criteria (company qualifications, project understanding, technical competency broken into five sub-areas, personnel experience, cost, and client references), the committee almost certainly includes: at least one Probation Department IT or operations staff member who will score technical competency, at least one Purchasing Services staff member who will evaluate compliance and cost, and potentially a Probation Department program manager or supervisor who will assess the understanding of officer workflows. The presence of the behavioral analysis requirement (analyzing motivational interviewing techniques) suggests a clinician or senior supervisor may also be involved.

The Q&A section (Section I of the RFP) contains a telling warning: 'The County reserves the right to disregard questions that appear to be generic, automatically generated, or not reflective of a reasonable review of the RFP.' This is a direct signal that the County has received AI-generated Q&A submissions before and found them useless. The evaluators know what a thoughtful question looks like versus what an auto-generated one looks like. Write specific questions that reference specific RFP sections and reveal genuine understanding of the criminal justice context.

The BAFO provision tells you the County expects initial prices to be negotiable. This is an office that uses competitive leverage. Submit your best price in the first round, but structure your proposal so you understand exactly which cost elements have margin flexibility if a BAFO round is called. Vendors who pad the initial bid expecting to discount in BAFO are playing a risky game, the evaluation scoring happens on the initial proposal, and a padded initial price may score below the threshold for a BAFO invitation.

Section 2: Strategic Read of This Solicitation

Analyst assessment: Contra Costa County Probation issued this RFP because they are facing a workforce sustainability crisis, not just an efficiency problem. The 40-50% administrative burden figure they cite is not unique to this county, it is a well-documented national problem in community supervision. But what makes this solicitation specific is the combination of requirements: PSI reports (which go to judges), violation petitions (which initiate revocation proceedings), and behavioral analysis of motivational interviewing (which influences case management decisions). These are not peripheral administrative tasks. They are the legal and clinical core of probation work. The Department is trusting an AI system to participate in work that directly affects whether people go to jail or stay in the community.

The evaluation structure does not assign explicit percentage weights to individual criteria, which is a deliberate choice. The solicitation lists six criteria in order (company qualifications, project

understanding, technical competency, personnel experience, cost, references) but does not say whether technical competency is worth 40% or 20% of the total score. This ambiguity benefits incumbents and well-known vendors who can rely on brand recognition in the first two criteria. It disadvantages smaller vendors who need the technical competency and cost criteria to compensate for lower name recognition. The implication: vendors who are not well-known in California county government procurement must invest heavily in the technical competency section, that is where the score differential is created.

The timeline is tight but not unreasonably so for a vendor who already has a CJIS-compliant AI platform. Publication to close in 28 days is the County's way of saying they are not interested in vendors who need to build something. They want vendors who have already solved this problem elsewhere and are adapting it for Contra Costa County. The 'turnkey, production-ready solution' language in Section II.E is the clearest possible signal of this intent. If your platform is not production-ready for criminal justice use today, this is not the bid to use as a development milestone.

The BAFO provision combined with the County's reserved right to award to multiple contractors creates an interesting strategic situation. A vendor who wins the co-design and technical evaluation but loses on cost could still receive a partial award for a subset of the scope. The County's phrasing in Section V.C, 'award a contract to the Bidder(s)' (plural), is deliberate. Vendors should consider whether a split-scope award is acceptable in their go/no-go analysis.

Read this as: The County wants one vendor who can do everything, but they will accept two vendors if no single vendor clearly dominates across all criteria. The winning strategy is a proposal that makes splitting the award seem like a worse outcome than giving the full contract to one vendor.

Section 3: Legal Framework, Clause-by-Clause Intelligence

3.1 Governing Law and Jurisdiction

California law governs. Disputes go to Contra Costa County courts. For an offshore-involved engagement, this means any dispute about subcontractor performance, data breach liability, or payment will be litigated in Martinez, California under California state law. The offshore team has no standing to sue the County directly. Any claim the offshore team has runs through the US Prime under the subcontract agreement.

3.2 Contract Clause Intelligence

Clause	What It Says	What It Actually Means	Specific Risk if You Ignore It
Section 5(c), Funding Cessation	Contract terminates without notice if federal, state, or other non-County funding ceases	If this contract is funded even partly by a federal or state grant, the County can walk away mid-contract with zero notice and zero severance if that funding is cut	Vendor absorbs all stranded implementation costs. No legal remedy exists for this scenario. Price the implementation line item to recover costs within the first 6 months of delivery.
Section 8(a), Board Approval for Amendments	Contracts over $100,000 require Board of Supervisors approval to amend	Any scope change or price adjustment above $100,000 contract threshold goes to a full Board meeting. Board meetings happen monthly, not on demand. A change request could take 4-6 weeks to process.	Do not assume quick resolution of scope ambiguities post-award. Clarify everything in Q&A before May 22.

Section 13, Subcontracts	Prior written County consent required before any subcontract	The County has veto power over every subcontractor the vendor uses, including offshore teams. They can approve or reject at sole discretion. There is no appeal.	Disclose the offshore team in the proposal before award. Waiting until post-award to seek approval risks having the offshore team rejected after you have priced the work assuming their involvement.
Section 15, Conflicts of Interest	No financial conflicts; no gifts; former County employees within 12 months create conflict risk	Any vendor who has hired a former Contra Costa County employee in the last 12 months must analyze that hire against Government Code 1090. If the employee worked on AI procurement or related policy, the conflict risk is material.	The indemnification for conflicts of interest is personal and survives the contract. A conflict finding after award can void the contract.
Section 16, Confidentiality	No disclosure of identity or records of persons served	Every probationer whose data enters the system is a 'person served.' Their identity, records, and the services provided to them cannot be disclosed by any person on the vendor team, including offshore staff, without criminal exposure.	An offshore team member who mentions a specific case or client detail in any external communication, even to the US Prime in an unsecured channel, has potentially committed a California misdemeanor.
Section 18, Indemnification	Vendor holds County harmless from all claims arising from services, even with concurrent County negligence	If an AI-generated PSI report contributes to a sentencing error and a civil rights claim results, the vendor's indemnification obligation is triggered. The County does not need to be solely negligent for the vendor's obligation to apply.	This risk is not insurable under standard general liability. Cyber liability and professional liability (E&O) are the coverage types that protect against AI-generated content errors. Carry both.
Section 25, Works Made for Hire	All deliverables are County property; all IP assigned to County	Custom templates, workflow configurations, and any training data derived from the County's engagement become County property at contract end. The vendor cannot take those customizations to other California county clients without separate licensing.	Vendors who plan to reuse Contra Costa County-specific configurations across other engagements need a licensing agreement with the County before contract end, not after.

3.4 OCI Analysis

Organizational conflict of interest exposure exists if a vendor or their subcontractors have any financial relationship with the County's existing CMS vendors (Tyler, Tiburon, Odyssey). If the AI platform vendor has a referral arrangement, integration partnership, or revenue-sharing agreement with one of these CMS providers, the County could view the vendor's CMS recommendation or integration approach as conflicted. Disclose any such relationships proactively under Section 15.

OCI also exists if any vendor personnel previously worked for Contra Costa County Probation Department or Purchasing Services within the past 12 months. Analyze your team against the Government Code 1090 standard before submitting.

3.5 NDA and Teaming Framework

Section 16 of the General Conditions establishes the confidentiality framework governing this contract. The restriction covers the identity of persons served, their records, and the services provided. For the offshore team, this means the NDA between the US Prime and the offshore provider must explicitly: (1) define 'confidential information' to include all criminal justice case data and the identity of any Contra Costa County probationer, (2) prohibit any offshore team member from discussing specific cases in any communication channel, including internal messaging, outside a secured, encrypted environment, (3) require immediate notification to the US Prime if any accidental disclosure occurs, (4) bind the offshore team to California law and accept Contra Costa County courts as jurisdiction for any breach claim.

3.6 Protest Risk

Protest grounds that a losing bidder could assert: (1) The evaluation criteria were applied inconsistently if one vendor was scored differently on technical competency than another for comparable capabilities. (2) The BAFO process was misused if not all eligible vendors were invited. (3) A winning vendor has an undisclosed conflict of interest under Section 15. To reduce protest exposure: apply evaluation criteria consistently and document scoring decisions; if a BAFO round is called, invite all finalists above a defined threshold; ensure your proposal discloses all relationships that could be perceived as conflicts. Losing vendors have 5 business days from Notice of Intent to Award to file. The protest window is short, but preparation during proposal evaluation is what reduces the risk.

Legal Do's and Don'ts Master Table

#	Legal Area	Do	Don't	Risk if Violated	RFQ Section
1	Subcontract Disclosure	Disclose offshore team in proposal and seek County approval pre-award	Don't engage offshore post-award without written County consent	Material breach; contract termination; no severance	Section III.J; Gen. Cond. 13
2	Confidentiality	Use encrypted, access-controlled channels for all case-related communication	Don't discuss case data in unsecured channels or with unauthorized offshore personnel	California misdemeanor for individuals; contract breach for entity	Gen. Cond. 16
3	CJIS Compliance	Complete CJIS background checks and signed Addendum before any system access	Don't allow any personnel to access the live system before CJIS clearance	CJIS violation; potential loss of all criminal justice contracts nationally	Section IV.F.1
4	Direct Contact	All pre-award communication	Don't contact Des Gebre, Probation staff, or any County employee directly	Disqualification of the vendor per Section I.G	Section I.G
5	Works Made for Hire	License any County-specific IP you intend to reuse before contract end	Don't transfer County deliverables to other clients	IP theft claim; breach of Section 25; potential litigation in Contra	Gen. Cond. 25

			without written County consent	Costa County courts	
6	Indemnification	Carry E&O/professional liability and cyber liability insurance	Don't rely solely on general liability for AI content error claims	Uncovered indemnification obligation surviving contract end	Gen. Cond. 18
7	Records Retention	Build 5-year retention into the data architecture from day one	Don't delete any contract records within 5 years of final payment, even after contract ends	Federal audit rights under Social Security Act still apply; destruction of records during audit is obstruction	Gen. Cond. 3

Section 4: Master Compliance Checklist

#	Exact Requirement	RFQ Section	Pass/Fail or Scored	Proposal Action
1	Submit proposal electronically by May 29, 2026, 3:00 PM PST	Section III.B	Pass/Fail	Upload completed package before 2:30 PM PST on May 29 to allow for upload time
2	Provide signed cover letter from authorized representative	Section III.A.a	Pass/Fail	Include as first page of proposal; authorized officer must physically sign
3	Technical narrative maximum 15 pages, minimum 12-point font	Section III.A.b	Pass/Fail (disqualification risk if exceeded)	Count every page including tables and graphics; do not rely on appendices to carry technical content
4	Submit Exhibit A, Statement of Experience	Section III.A.c	Pass/Fail	Complete all sections A through N; include years under current and prior names; list key personnel
5	Submit Exhibit B, Proposal Price with all six line items	Section III.A.d; Section VI.C	Pass/Fail	Price all six categories: Implementation, Usage-Based, Training, Subscription, Customization, Support. Annual summary required per Section VI.A
6	Submit Exhibit C, minimum three customer references (government agencies)	Section III.A.e; Section III.C	Scored	Use government agency references; provide complete contact information; services provided must be comparable in scope
7	Submit Exhibit D, Anti-Collusion Statement, signed	Section III.A.f; Section III.M	Pass/Fail	Authorized officer signature required; certifies independent pricing
8	Submit Exhibit E, Contra Costa County Business Opportunities Registration Form	Section III.A.g	Pass/Fail	Complete all sections including SBE/MBE/WBE/DBE/DVBE/LBE classification checkboxes; sign and date

9	Submit Attachment A, Addendum Acknowledgement, signed	Section III.A.h; Section I.H	Pass/Fail (non-response makes proposal non-responsive)	Initial each addendum received; if no addenda issued, submit blank with firm information completed
10	Submit federal, state, and local permits and licenses	Section III.A.i; Section III.D	Pass/Fail	Include California business license; any applicable professional licenses; Contra Costa County permits if required
11	Submit Certificate of Insurance with Endorsement Letter	Section III.A.j	Pass/Fail	Endorsement must name County as additional insured; coverage limits must meet General Conditions Section 19 thresholds based on contract value
12	Minimum 2 years experience in AI report-writing and documentation automation	Section II.A	Pass/Fail	Demonstrate with dated project references in Exhibit A; 'years in business' alone is insufficient
13	Demonstrate CJIS Security Policy compliance capability	Section IV.F.1	Scored (security criterion)	Describe CJIS-compliant architecture; confirm signed Addendum process at award; confirm background check process
14	SOC 2 Type II certification	Section IV.F.3	Pass/Fail (mandatory)	Provide current audit report or confirm active audit participation with expected completion date
15	Provide turnkey, production-ready solution	Section II.E	Pass/Fail	Platform must exist and be deployable at contract start; describe existing deployments in comparable environments
16	Acknowledge and adhere to Piggybacking provision (Yes or No response required)	Section I.F	Scored (not pass/fail, but unanswered = red flag)	Check Yes or No explicitly on the Piggybacking question; no response looks like an oversight
17	Accept FFP pricing terms; prices firm for full contract duration	Section VI.C	Pass/Fail	Do not include price escalation clauses or CPI adjustments, these conflict with the FFP requirement
18	Confirm capability to invoice annually	Section VI.A	Pass/Fail	State explicitly in Exhibit B or cover letter that annual invoicing is acceptable
19	Propose a transparent and scalable pricing structure covering all six Exhibit B categories	Section VI.C	Scored	Each pricing category must be independently legible; do not bundle all costs into a single subscription fee
20	Describe enhancement request process including SLAs for new report types and UAT framework	Section IV.I.3	Scored	Be specific: give estimated timelines for simple vs complex report template development; define UAT process

Section 5: Technical Strategy

5.1 Requirement-by-Requirement Analysis

Generative report writing from multiple data types (Section IV.A): What it demands, the system must ingest field notes, voice dictations, interview transcripts, and external reference documents simultaneously and synthesize a coherent narrative. What it means for delivery, the vendor must have a production data ingestion pipeline that handles unstructured audio, unstructured text, and semi-structured documents without human normalization. The proposal must describe this pipeline specifically: what formats are accepted, what the output format is, and how the system handles conflicting information from multiple inputs.

Mandated documentation types (Section IV.A): What it demands, PSI reports, bail studies, chronological case notes, contact summaries, violation petitions must be natively supported at go-live. What it means for delivery, demonstrate these document types exist in the platform today. Do not describe them as roadmap items. The oral presentation, if invited, should include a live demonstration using a synthetic (non-real) probationer case.

Human-in-the-loop with audit logs (Section IV.A): What it demands, officer-editable drafts with complete audit trails. What it means for delivery, the audit log must capture: who generated the draft, what source data was used, every edit made by the officer, and the final state submitted to the CMS. This log must be exportable and searchable for compliance review.

Behavioral and qualitative analysis (Section IV.A): What it demands, the conversational AI must analyze motivational interviewing transcripts to assess client responses. What this means for delivery, this is clinical decision support functionality. The vendor must clarify whether the system provides structured scores, narrative summaries, or flag-based outputs, and must describe the validation evidence for the accuracy of these assessments.

CJIS compliance (Section IV.F.1): What it demands, encryption in transit and at rest; advanced authentication; audit logging; signed CJIS Addendum; background checks. What this means for delivery, the vendor must have a documented CJIS compliance program that applies to every system, every employee, and every subcontractor with logical or physical access to CJIS data. If the vendor has never operated in a CJIS environment before, this contract is not the place to learn.

5.2 What-If Scenarios

Scenario	Likelihood	Risk Level	Recommended Action
BAFO is called and the County asks for a 15-20% price reduction	Medium	High	Identify in advance which cost elements have the most margin. Implementation and customization typically have more flexibility than subscription fees. Do not cut training, shortchanged training creates performance problems that trigger Section 5(b) termination risk.
The County's CMS is a custom-built legacy system not named in the solicitation	Medium	High	Submit a Q&A question before May 22 asking the County to identify their current CMS platform(s) and any available API documentation. A custom-built legacy CMS could significantly increase integration cost and timeline beyond your initial estimate.
CJIS background check process takes longer than expected and delays go-live	High	Medium	Begin fingerprint-based background check enrollment for all proposed personnel immediately upon award. Build a 60-90 day CJIS clearance buffer into the

			implementation timeline submitted in the proposal.
The County's subcontract approval request for the offshore team is denied or delayed	Low-Medium	High	Price the proposal so it is deliverable without offshore post-award involvement. Offshore contribution to post-award delivery should be positioned as a cost-saving option, not a delivery dependency. If offshore approval is denied, you must be able to deliver with US-based staff.
A competing vendor offers a lower price with comparable CJIS credentials	High	High	The evaluation criteria do not assign explicit weights, which gives the committee discretion to weight technical quality heavily. Maximize differentiation on audit trail robustness, hallucination prevention architecture, and number of comparable criminal justice deployments, these are the areas where premium pricing is defensible.
The County uses the split-award option and gives one vendor the platform and another the training	Low	Medium	Structure pricing so the platform subscription and training can be separated without adverse economics. If training is bundled into the subscription at zero incremental cost, you cannot separate it gracefully.

5.3 Evaluator Mindset

The technical competency committee member from Probation Department will read the proposal looking for one thing: does this vendor understand what a probation officer actually does? Generic descriptions of 'AI-powered document automation' will not impress someone who spends their day writing PSI reports and managing a caseload. Show specific understanding of: the difference between a PSI report and a violation petition (different audiences, different legal standards, different formatting requirements), the CJIS restrictions that govern how probation data can be handled, and the officer safety context that makes the mobile application's real-time warrant and hazard flag features critical.

The Purchasing Services evaluator will read the proposal looking for compliance completeness and pricing transparency. They will compare your Exhibit B line items against the RFP's Section VI structure and note any gaps. They will check that your Exhibit A is fully completed and your references are government agencies. They will verify the COI endorsement names the County as additional insured. They will not give you the benefit of the doubt if something is missing, they will score it as non-responsive on that element.

The cost evaluator will look at total 2-year cost, annual breakdown, and the transparency of the pricing model. Vendors who bundle everything into a single annual fee invite skepticism. Vendors who provide a clear per-line-item breakdown with defined unit pricing for usage-based elements demonstrate cost discipline and transparency.

5.4 Technical Approach Structure

Recommended technical narrative outline for the 15-page limit:

Cover Letter (not counted in 15 pages): Executive summary of your qualifications, 1 page.

Understanding of Requirements (2 pages): Demonstrate command of the criminal justice context. Reference the specific document types, CJIS requirements, and the 40-50% administrative burden problem. Show the evaluator that you have read the solicitation carefully.

Proposed Solution Architecture (3 pages): Describe the platform, the data ingestion pipeline, the AI model architecture (specify whether it uses RAG, fine-tuning, or prompt-based approaches), the CMS integration approach, and the closed-system design. Include a simple architecture diagram if it fits within the page limit.

Security and Compliance (2 pages): CJIS compliance program, SOC 2 Type II status, data residency, encryption standards, and the background check process. Do not generalize, cite specific standards and specifications.

Implementation and Project Management (2 pages): The implementation plan including pilot approach, parallel testing, co-design workshop plan, and go-live timeline. Name the dedicated project manager.

Training and Change Management (1 page): Specific training deliverables, modalities (in-person, virtual), and ongoing support model.

Scalability and Future Enhancements (1 page): The extensible configuration engine, SLAs for new report types, and the UAT framework per Section IV.I.

Company Experience and References (2 pages): Narrative description of two to three comparable criminal justice deployments. Reinforce with Exhibit C references. Include metrics where available (time saved, adoption rate).

Key Personnel (1 page): Summarize names and qualifications for the project manager, technical lead, and training lead. Point to Exhibit A Section L for full detail.

Total: 14 pages, leaving one page of buffer for tables and formatting.

5.5 Technical Do's and Don'ts

Do	Don't / Consequence
Name the specific CMS platforms you have successfully integrated with in comparable criminal justice environments	Don't claim CMS integration capability without naming platforms, evaluators know which systems Probation Departments use and will ask in oral presentation
Describe the hallucination prevention mechanism technically, not philosophically (Section IV.C)	Don't say 'our system minimizes hallucination', say 'our system requires the AI to cite the source document and section for every factual claim before generating the narrative'
Provide a SOC 2 Type II audit report or a definitive completion date with evidence of current participation (Section IV.F.3)	Don't describe SOC 2 compliance as 'in progress' without a completion date, this reads as a compliance gap to the security evaluator
Propose specific, named key personnel in Exhibit A Section L (Section II.L refers to proposal)	Don't list 'TBD' personnel, the County evaluates experience of personnel assigned to the project as a separate criterion
Distinguish the AI's role from the officer's role clearly in every description (Section IV.A, human-in-the-loop)	Don't describe the system as 'automatically filing documents' or 'automating submission', this directly contradicts the human-in-the-loop requirement

Section 6: Pricing Strategy, Full Guidance

6.1 Pricing Model Required

Exhibit B requires prices in six line items: (1) Implementation and Integration, (2) Usage-Based Pricing, (3) Training, (4) Subscription, (5) Customization and Professional Services, (6) Support and Maintenance. All prices must be Firm Fixed Price for the contract duration per Section VI.C. Annual

invoicing is confirmed per Section VI.A. Provide a 2-year summary broken into Year 1 and Year 2 costs.

6.2 Budget Intelligence and Solicitation-Derived Estimate

No budget is stated. The six categories in Exhibit B are the County's cost structure, they represent how the County's finance team will process and approve payments. Price each category independently and transparently.

Exhibit B Line Item	Low ($)	Mid ($)	High ($)	Key Driver
1. Implementation and Integration	75,000	120,000	200,000	CMS complexity; security hardening depth
2. Usage-Based Pricing (Year 1 + Year 2)	0, 20,000	20,000, 60,000	60,000, 120,000	Report volume; API calls; user count
3. Training	20,000	40,000	60,000	Number of officers; in-person vs virtual; materials
4. Subscription (Year 1 + Year 2)	160,000	300,000	500,000	License tier; number of users; feature set
5. Customization and Professional Services	30,000	60,000	100,000	Template count; co-design workshop hours
6. Support and Maintenance (Year 1 + Year 2)	40,000	60,000	90,000	SLA tier; 24/7 vs business hours
TOTAL 2-YEAR RANGE	~325,000	~580,000	~950,000+	All figures are analyst estimates

All figures above are analyst estimates derived from this solicitation's scope structure and comparable California county AI platform procurements. They are not guarantees of County budget availability.

6.6 Price-to-Win Analysis

The evaluation criteria list Cost as criterion #5 of 6, after company qualifications, project understanding, technical competency, and personnel experience. Cost is not the top-weighted criterion by position, but the County reserved a BAFO right, which signals they care about cost enough to negotiate. The practical scoring implication: a vendor who scores above average on criteria 1-4 and comes in 10-15% below the median on cost will likely win. A vendor who scores highest on technical competency but prices 25% above the median faces a real risk of losing to a BAFO-eligible competitor who is technically comparable.

Target price range recommendation: Price the two-year total in the $450,000 to $650,000 range based on the analyst estimate, with Year 1 front-loaded for implementation recovery and Year 2 normalized to recurring costs. Below $350,000 likely signals under-resourcing of the implementation and support scope. Above $750,000 invites aggressive BAFO pressure.

6.8 Specific Pricing Mistakes for This RFQ

Mistake 1: Bundling all costs into a single annual subscription. The County's Exhibit B has six separate line items. An undifferentiated price fails the transparency test and confuses the cost evaluator.

Mistake 2: Pricing training at zero or folding it into implementation. Training is a scored evaluation criterion (part of technical competency). An unpriced or $0 training line suggests the vendor has not thought through the change management requirement.

Mistake 3: Offering price escalation clauses. Section VI.C requires firm fixed prices for the contract duration. A CPI escalation clause or 'subject to renewal pricing' note in Exhibit B creates a compliance failure.

Mistake 4: Leaving the usage-based pricing line blank or stating 'to be determined.' The County needs to understand their cost exposure for the full contract term. If your model is usage-based, provide a price per report generated and an estimated annual volume, then cap the annual liability.

Mistake 5: Underpricing support to win on total cost, then delivering inadequate coverage. CJIS environments require rapid response to security incidents. A support SLA that does not include 24/7 incident response for security events is a CJIS compliance risk, not just a service quality issue.

Section 7: Evaluation Criteria Master Analysis

Criterion	Weight	What a Winning Proposal Does	What a Losing Proposal Does
1. Company Qualifications and Experience	Unstated	Names specific criminal justice AI deployments with dates, client names, and outcomes. References confirm comparable scope. Exhibit A Section D shows 3+ relevant projects in last 5 years.	Claims 'experience in government AI' without naming criminal justice clients. Uses healthcare or financial services references as equivalents. Exhibit A is partially complete.
2. Project Understanding, Methodology, Approach	Unstated	Demonstrates understanding of the 40-50% administrative burden problem. Names the specific document types (PSI, bail studies, violation petitions). Describes a pilot-first implementation approach with parallel testing.	Describes 'AI document automation' in generic terms. Does not reference probation-specific workflows. Proposes a waterfall implementation with no pilot.
3a. Functional Capabilities	Unstated	Provides specific examples of multi-data-input synthesis (voice + notes + external docs). Demonstrates existing PSI and violation petition templates. Shows multi-format output support.	Describes capabilities at feature-list level without examples. References templates 'to be configured' post-award.
3b. AI Performance and Accuracy	Unstated	Provides accuracy metrics from comparable deployments. Describes the hallucination prevention architecture technically. Shows confidence indicators and source citation in demo or screenshots.	Claims 'industry-leading accuracy' without data. Does not address hallucination risk. No source citation mechanism described.
3c. Integration and Interoperability	Unstated	Names Tyler, Tiburon, and/or Odyssey as CMS platforms previously integrated. Provides CJIS-compliant API documentation	Claims 'enterprise API integration capability' without naming specific systems. No CJIS API compliance described.

		or references. Describes SSO and active directory integration.	
3d. Security and Compliance	Unstated	Provides SOC 2 Type II audit report. Describes CJIS Addendum process. Includes FedRAMP equivalence mapping. Provides pentest summary.	SOC 2 described as 'in progress.' CJIS compliance described generically. No pentest documentation.
3e. Usability and UX	Unstated	Includes officer dashboard screenshots. Describes the training program specifically. Provides user adoption metrics from comparable deployments.	Describes 'intuitive interface' without screenshots. Training described as 'on-site and virtual sessions' with no further detail.
4. Personnel Experience	Unstated	Named project manager with criminal justice technology experience. Technical lead with CJIS compliance credentials. All key personnel in Exhibit A Section L.	Key personnel listed as 'TBD' or named without relevant credentials. Project manager has no criminal justice technology background.
5. Cost	Unstated	Transparent six-category Exhibit B pricing. Annual breakdown provided. Usage-based pricing includes defined unit rates and annual cap. Pricing within the estimated $450,000-$650,000 two-year range.	All-inclusive bundled price without category breakdown. No usage-based rate definition. Price significantly above or below the estimated range without explanation.
6. Client References	Unstated	Three government agency references with complete contact information. Services described are comparable to this scope. References are reachable and will confirm positive outcomes.	References include private sector clients. Contact information is incomplete. Services described do not match the AI report-writing scope.

Section 8: Submission Requirements

CRITICAL DEADLINE

Field	Detail
Submission Deadline	May 29, 2026, NO LATER THAN 3:00 PM PST
Submission Method	Electronic submission. No fax. No email. No exceptions.
Contact for Technical Assistance	Call 800-835-4603 for technical support
Late Bid Consequence	Automatic rejection, no exceptions, no reconsideration
Questions Deadline	May 22, 2026, no later than 3:00 PM PST

8.2 Required Documents Checklist

#	Document	Mandatory	Format	Where It Goes	Status

1	Cover Letter, signed by authorized rep	Yes	PDF/Word	First document, submission package	[ ] Complete
2	Technical Proposal Narrative, max 15 pages, min 12pt font	Yes	PDF	Main proposal document	[ ] Complete
3	Exhibit A, Statement of Experience (Sections A-N)	Yes	PDF/Word	Exhibit attachment	[ ] Complete
4	Exhibit B, Proposal Price (all 6 line items; authorized signature)	Yes	PDF/Word	Exhibit attachment	[ ] Complete
5	Exhibit C, Customer References (minimum 3 government agency refs)	Yes	PDF/Word	Exhibit attachment	[ ] Complete
6	Exhibit D, Anti-Collusion Statement (signed in ink)	Yes	PDF	Exhibit attachment	[ ] Complete
7	Exhibit E, CCC Business Opportunities Registration Form	Yes	PDF	Exhibit attachment	[ ] Complete
8	Attachment A, Addendum Acknowledgement (signed; initials per addendum)	Yes	PDF	Attachment	[ ] Complete
9	Federal, State, and Local Licenses and Permits	Yes	PDF copies	Supporting documents	[ ] Complete
10	Certificate of Insurance with Endorsement Letter naming County as additional insured	Yes	PDF	Supporting documents	[ ] Complete
11	SOC 2 Type II Audit Report or participation confirmation	Yes (mandatory)	PDF	Supporting documents or reference in technical narrative	[ ] Complete

8.4 Amendment Tracking

Monitor, for all amendments from May 1, 2026 through May 29, 2026. When an amendment is issued, download it immediately, update your proposal to reflect any changed requirements, and initial the new addendum number in Attachment A. Failure to acknowledge any issued amendment can make the proposal non-responsive. Set up email notifications for this solicitation the day you register.

8.5 Strategic Q&A Questions

Submit these questions, before May 22, 2026, 3:00 PM PST. Each question is referenced to the specific solicitation ambiguity it resolves.

Question	Why It Matters	Answer That Changes Proposal Strategy

Can the County identify the specific Case Management System(s) currently deployed by the Probation Department, and whether API documentation is available?	Integration complexity and cost depend entirely on CMS type. A county-built legacy system costs more to integrate than Tyler or Odyssey.	If the answer is a custom-built or unsupported legacy system, increase implementation pricing by 30-40% and flag the timeline risk.
Does the County have an estimated number of active probation officers who will use the platform, or an expected report volume (reports per month or year)?	User count and report volume drive subscription and usage-based pricing. Without this, Exhibit B pricing is speculative.	If user count exceeds 100 or report volume exceeds 5,000 per month, the subscription line item increases materially.
Will the County define quantitative accuracy benchmarks and the parallel testing acceptance criteria referenced in Section IV.E.1 before contract award?	Without defined acceptance criteria, both parties will disagree about when the pilot is complete. This is the single highest post-award dispute risk.	If the County defines specific accuracy thresholds, build them into the proposal as your committed performance standard.
Is the contract anticipated to be funded by federal or state grant funds, and if so, does any grant impose specific data handling, audit, or DBE requirements?	Federal funding triggers OMB A-133 audit requirements at the contractor's expense under General Conditions Section 27. It also potentially triggers DBE goals.	If federally funded, increase overhead budget for audit compliance and assess whether DBE teaming requirements affect subcontract structure.
Does the County require data to remain within California or within the United States, or is there a specific data residency requirement for CJIS data?	CJIS prohibits international data storage; California-only residency would restrict cloud hosting options further and affect pricing.	California-only residency may increase infrastructure costs if your primary cloud region is not in California.

Section 9: Winning Proposal Strategy

9.1 Recommended Proposal Architecture

Lead the cover letter with your most comparable criminal justice AI deployment, not your company overview. The evaluator's first question is 'have they done this before in a probation department?' Answer it in the first paragraph.

Structure the 15-page technical narrative around the evaluation criteria sequence, not the scope sequence. The County evaluates in this order: company qualifications, project understanding, technical competency (5 sub-areas), personnel, cost. Build the narrative in that order so the evaluator does not have to search for the content that maps to their scoring rubric.

Put the CJIS and SOC 2 compliance discussion earlier in the technical narrative than feels natural, end of page 4 or start of page 5. Evaluators for criminal justice AI contracts are primed to look for this content. If they reach page 8 and have not seen it, they have already started marking down on security.

9.2 What Wins the Technical Section

Specific criminal justice deployments with named agencies, measurable outcomes (time saved per officer per week, adoption rate, report accuracy rate), and reachable references. The oral presentation,

if invited, must include a live demonstration using PSI report and violation petition templates with synthetic data. A recorded demo is acceptable if the live system is unavailable for security reasons, but the evaluator must see the actual output quality.

9.3 What Wins the Cost Section

Transparency and structure win the cost section, not the lowest price. A proposal with a clear six-category breakdown, defined unit rates for usage-based pricing, and an explicit annual cap on usage costs will score better than an undifferentiated lower price. Structure the Exhibit B so the evaluator can add up the 2-year total themselves and confirm it matches your cover letter summary.

9.5 The Three Most Important Things to Get Right

First: CJIS compliance. Any gap in the CJIS compliance narrative, missing signed Addendum process description, no background check protocol, no CJIS-specific encryption description, signals to the evaluator that the vendor does not understand the mandatory compliance framework. This is the fastest way to lose the security criterion.

Second: Turnkey readiness. The proposal must demonstrate the platform exists today for criminal justice use, not that it will be built or configured after award. This means named past deployments, current SOC 2 Type II status, and screenshots or demonstration-ready system access.

Third: Proposal format compliance. Proposals that exceed 15 pages, use font smaller than 12pt, omit any exhibit, or fail to sign in ink where required will be scored as non-responsive on those elements. The format compliance check happens before the technical evaluation begins.

9.6 Three Most Common Reasons Proposals Lose This Type of Bid

First: Over-promising on capability without substantiation. Claiming to support 'all criminal justice document types' without naming them and showing examples reads as a sales claim, not a technical assurance.

Second: Pricing without cost element transparency. Bundled pricing that does not allow the County to understand what they are paying for each year fails the transparency test and confuses the cost evaluator.

Third: Generic references that are not comparable. A healthcare EHR implementation is not a comparable reference for a criminal justice AI report-writing contract. The evaluator knows the difference and will score accordingly.

9.7 Discriminators

Three factors separate the winning proposal from second place in this specific solicitation. First: a named comparable probation department deployment with documented time savings. If a competitor names Sacramento County Probation as a client and you can name Alameda County Probation, you have demonstrated the same credibility and compete on cost. If you cannot name any probation department, you are competing against someone who can, at a structural disadvantage.

Second: the hallucination prevention architecture. The County's requirement for enforced source citation is specific and technically demanding. A proposal that describes this technically, RAG with mandatory citation, confidence scores, source-grounded output, differentiates from a proposal that says 'our AI is accurate.' Technical specificity on this point signals genuine capability.

Third: the co-design track record. Vendors who can describe specific prior co-design engagements (workshops held, workflow maps produced, document types discovered and automated) score higher on the methodology criterion than vendors who describe a generic requirements gathering process.

9.8 Task Split: Offshore vs. US Prime

US Prime Must Own	Offshore Can Execute (Pre-Award)
All direct communication with County before, during, and after bid	Full RFP analysis and compliance matrix
All exhibit signatures (A, B, C, D, E)	Technical narrative drafts (sections 2-8 of recommended structure)
Submission, US Prime account only	Pricing research and Exhibit B worksheet structure
Go/no-go decision and final pricing approval	Compliance checklist verification against all 20 checklist items
Cover letter and authorized representative certification	Q&A question drafts for US Prime review before submission
All post-award delivery roles pending County subcontract approval	Competitor research and market intelligence on other bidders

Section 10: Offshore Provider, Legal and Operational Framework

10.1 Legal Basis

The solicitation contains no explicit prohibition on offshore involvement. Section III.J of the RFP and General Conditions Section 13 both require prior written County consent before entering any subcontract for work contemplated under the contract. Pre-award proposal support is not a subcontract obligation, it is performed before contract award and does not require County approval. Post-award involvement of offshore personnel requires formal subcontract approval from the County.

10.2 Hard Limits

The offshore team may never: contact Des Gebre, any Probation Department staff, or any Contra Costa County employee at any stage, this risks disqualification per Section I.G; submit any document on behalf of the US Prime; handle, store, or process any actual County criminal justice case data (CJIS prohibits this); represent themselves as the prime or affiliated with the prime in any communication; receive CJIS-regulated information without obtaining CJIS clearance through the proper channel.

10.3 NDA Requirements

The NDA between the US Prime and offshore provider for this engagement must include: (1) explicit coverage of California Public Records Act-protected information; (2) definition of 'confidential information' to include the identity of any person served by the Probation Department; (3) prohibition on disclosure in any channel not approved by the US Prime; (4) California law as governing law, Contra Costa County courts as jurisdiction; (5) five-year records retention obligation mirroring General Conditions Section 3; (6) immediate notification requirement for any potential breach; (7) provision that the NDA survives contract termination indefinitely for confidentiality obligations arising from criminal justice data.

10.4 Subcontract Agreement Structure

Per General Conditions Section 13, the subcontract between the US Prime and offshore provider must be submitted for County approval before the offshore team performs any post-award work. The subcontract must include: scope of work limited to County-approved activities; the same records retention obligation (5 years per Section 3); CJIS compliance obligations including signed CJIS Addendum and background checks for any personnel accessing the system; confidentiality obligations

mirroring General Conditions Section 16; indemnification running from the offshore provider to the US Prime for any breach caused by the offshore team.

10.5 Data Classification

Data Type	Can Go Offshore	US Prime Only	Handling Requirement
RFP and solicitation documents	Yes	No	Standard document handling; no special restriction
Pricing research and market data	Yes	No	Handle in secure file-sharing environment; do not commingle with County data
Proposal draft content (no County-specific data)	Yes	No	Review and certification by US Prime before submission; all content becomes US Prime responsibility
Actual probationer case data (post-award)	Never	Yes	CJIS prohibits international access to criminal justice information; no exceptions
County system credentials or API keys	Never	Yes	Never share system access credentials with offshore team under any circumstances
SOC 2 or CJIS audit documentation	No	Yes	Contains security architecture details; restrict to cleared US-based personnel

10.6 Communication Protocol

The offshore team communicates only with the US Prime. Never with the County, never with Probation Department staff, never with customer service on the prime's behalf. The US Prime owns all communication channels. Any direct offshore-to-County communication, even a technical support question to the helpline, violates the correspondence requirement in Section I.G, which states vendors are 'specifically directed not to contact County personnel.' Disqualification risk is real.

10.7 Offshore Pre-Bid Work Package

Work Package 1, Solicitation Analysis (deliverable: compliance matrix): Complete the master compliance checklist in Section 4 of this document. Map every SHALL and MUST requirement to a specific proposal section. Flag any requirement where the US Prime team needs to make a go/no-go decision.

Work Package 2, Technical Narrative Drafts (deliverable: Word document, sections 2-8 of the recommended structure): Draft the technical narrative for the Understanding of Requirements, Proposed Solution Architecture, Security and Compliance, Implementation and Project Management, Training and Change Management, Scalability, and Company Experience sections. Maximum combined length: 12 pages (leave 3 pages for US Prime to add cover letter narrative and key personnel sections).

Work Package 3, Exhibit B Pricing Research (deliverable: pricing research memo + formatted Exhibit B worksheet): Research comparable California county AI platform contract values using public procurement databases. Build the Exhibit B worksheet with the six line item structure, recommended price ranges per the Section 6 estimate, and leave pricing cells for US Prime final decision.

Work Package 4, Q&A Question Drafts (deliverable: five draft questions with rationale): Prepare the five strategic Q&A questions in Section 8.5 of this document in final submission form. US Prime reviews, approves, and submit before May 22 deadline.

Work Package 5, Compliance Cross-Check (deliverable: go/no-go compliance memo): Before the US Prime finalizes the proposal package, run the completed draft against all 20 checklist items in Section 4. Flag any gaps. Document completion status for each item.

Section 11: Post-Award Operational Guide

11.1 Transition-in Sequence

Week 1: Assign dedicated project manager; execute CJIS Addendum signing process; begin background check enrollment for all personnel requiring system access; schedule kickoff meeting with County Probation Department project team.

Weeks 2-4: Complete system configuration and security hardening; initiate active directory and SSO integration with County IT; begin co-design requirements workshops with probation officer subject matter experts.

Month 2: Complete CMS integration in test environment; begin parallel testing of report generation accuracy against County-provided test cases; deliver initial training materials for review.

Month 3: Pilot launch with selected units; collect officer feedback; refine template configurations based on workflow mapping; complete parallel testing sign-off.

Month 4-5: Full deployment; in-person and virtual training delivery; helpdesk support activation; administrative dashboard configuration for County analytics needs.

11.3 Offshore Involvement Post-Award

The offshore team may not perform any post-award work without County written approval of the subcontract per Section III.J. The approval request must describe the specific scope of offshore involvement, the CJIS compliance measures that apply, and the data handling restrictions. Submit this request with the proposal or in the first week of contract performance to avoid delays. If approval is denied, all post-award delivery reverts to US Prime staff at the pricing already committed.

11.4 Reporting and Invoicing

Weekly or biweekly progress briefings to County project manager in the format agreed at kickoff. Annual invoicing per Section VI.A. Invoice must identify: contract number (RFP_F-CONTR-0000000220 or resulting contract number), billing period, services delivered against each Exhibit B line item, and cumulative contract value. Under General Conditions Section 4, any document submitted to County with a value over $5,000 must include a separate section listing all subcontracts and their dollar amounts.

Section 12: Risk Register

#	Risk	Category	Likelihood	Impact	Mitigation	Owner
1	CJIS background checks delayed beyond implementation timeline	Compliance	High	High	Begin fingerprint enrollment immediately upon award; build 90-day clearance buffer into implementation plan	US Prime PM
2	Legacy or custom CMS requires	Technical	Medium	High	Submit Q&A question about CMS type before	US Prime Technical Lead

	unanticipated integration work				May 22; include contingency pricing in implementation line item	
3	County exercises BAFO and demands 20%+ price reduction	Bid Risk	Medium	High	Identify margin-flexible cost elements before submission; do not cut training or support lines, cut professional services if needed	US Prime Capture Manager
4	County denies offshore subcontract approval after award	Offshore Risk	Low-Med	High	Price proposal so it is deliverable without offshore post-award staff; disclose offshore team in proposal to reduce approval uncertainty	US Prime Principal
5	Hallucination in AI-generated PSI report creates legal claim	Performance	Low	Very High	Implement enforced source citation; require officer review before any submission; carry E&O and cyber liability insurance	US Prime Technical Lead
6	SOC 2 Type II audit not complete by proposal submission	Compliance	Medium	High	Provide written confirmation of audit participation with expected completion date; explain controls in place during audit period	US Prime Compliance Lead
7	Funding cessation terminates contract mid-implementation	Financial	Low	Very High	Front-load implementation cost recovery in Year 1 pricing; clarify funding source in Q&A; understand termination for convenience exposure	US Prime Finance
8	Proposal exceeds 15-page limit after final edits	Bid Risk	Medium	High	Count pages at each draft review; assign US Prime editor to enforce page limit; do not include appendices that look like technical content	US Prime Proposal Manager

9	Technical failure during submission	Bid Risk	Low	Very High	Target submission no later than 1:00 PM PST on May 29; call 800-835-4603 Option 2 for technical assistance if needed; do not wait until 2:55 PM	US Prime Proposal Manager
10	Competing vendor has lower price with equivalent CJIS credentials	Competitive	High	High	Differentiate on depth of criminal justice deployment track record and technical specificity of hallucination prevention; accept cost competitive range $450K-$650K	US Prime Capture Manager
11	Offshore team member makes direct contact with County personnel	Offshore Risk	Low	Very High	Brief offshore team in writing before any pre-bid work begins: zero contact with County at any stage; confirm understanding in writing	US Prime PM
12	Acceptance criteria dispute delays full-deployment payment	Performance	Medium	High	Submit Q&A question requesting defined accuracy benchmarks; propose specific UAT framework in technical narrative; get acceptance criteria in writing before pilot begins	US Prime PM

Section 13: IT/Cybersecurity Win Strategy (Module M-IT)

CJIS compliance is not a feature, it is the price of entry for this contract. Every vendor who reaches the evaluation stage will claim CJIS compliance. The vendors who score higher on the security criterion are the ones who demonstrate how their CJIS compliance works, not just that it exists.

Three technical differentiation points for the security evaluation: First, describe the CJIS Addendum process specifically, who signs it, when, through which California DOJ channel, and what the average clearance timeline is based on your prior engagements. An evaluator who has never worked through this process will appreciate the specificity. Second, describe your incident response process for a security event in a CJIS environment, who is notified, in what order, within what timeframe. The CJIS Security Policy mandates specific incident reporting requirements; showing you know these requirements without being asked is a signal of genuine compliance. Third, provide your most recent penetration testing executive summary as a proposal attachment. Label it clearly and limit it to the executive summary, not the full technical report with vulnerability details.

The 'closed system' requirement (Section I.C) is an architectural constraint that eliminates several popular AI platforms from competition. Any vendor whose core product calls OpenAI, Anthropic, or any external API at inference time cannot meet this requirement without a fundamental architectural

change. If your platform is built on an externally-hosted model, you must describe a compliant architecture that isolates County data from the external model. Air-gapped or on-premises LLM deployment is one approach; a County-specific dedicated instance with no data sharing is another. Describe your approach specifically.

Section 14: Training/eLearning Win Strategy (Module M-TRAIN)

Training is listed as a separate Exhibit B line item, which means the County is tracking training cost independently. This signals the County considers training a significant standalone deliverable, not just a product feature. Vendors who price training at zero or fold it into implementation create a cost transparency problem and undersell the change management challenge.

The training scope in Section IV.D.3 requires in-person and virtual delivery, user training materials, quick-reference guides, and onboarding modules. For a county probation department, in-person training matters, probation officers are not always comfortable with new technology, and some will not be reachable through virtual-only formats. Describe the in-person training plan specifically: number of sessions, location (County facility or remote), trainer qualifications, and the support model for officers who need follow-up after initial training.

The change management element embedded in the training requirement is the harder challenge. Officers who currently type field notes on a keyboard at the end of their shift are being asked to trust AI to generate court-ready drafts. The resistance to this change is predictable and human. Winning proposals describe specific change management strategies, officer champions, phased adoption, feedback loops from pilot participants to inform training refinements, rather than just listing training deliverables.