



Hope, Opportunity, Perseverance, & Empowerment (HOPE) for Children

901 P Street, Suite 411B Sacramento, CA 95814

Request for Proposals (RFP) No. HOPE03-25

Program Administrator

ADDENDUM NOTICE NO. 1

August 22, 2025

The following updates are provided regarding the California HOPE for Children Trust Account Program Board's (HOPE Board or Board) Request for Proposals (RFP) No. HOPE03-25.

The Scope Overview, Scope of Work, and Term of Agreement are hereby revised as follows.

Section 1.2 Scope Overview (*page 2 of 19*) is modified to clarify the website's integration of the recordkeeping platform as outlined in the milestone(s) outlined for March 1, 2026.

1.2 Scope Overview

March 1, 2026: Full Website Live with Full Portal Accessible with Claiming and Distributions Capabilities Available and integrated with Outcome Tracker Recordkeeping Platform offered by VistaShare LLC, or alternative recordkeeping platform.

Section 1.3 Scope of Work (*pages 4-5 of 19*) is modified to clarify the website's integration of the recordkeeping platform and other website requirements as outlined in Section 1.3(1)(C)(ix) and Section 1.3(1)(C)(xi).

1.3 Scope of Work (Section 1.3(1)(C)(ix))

~~(ix)~~ Contractor shall provide for the integration of Outcome Tracker, the online recordkeeping platform offered by VistaShare, to support HOPE, as it is the recordkeeping platform currently utilized by child savings account (CSA) programs administered by the State Treasurer's Office. If Contractor is not currently integrated with VistaShare's Outcome Tracker, Contractor must provide a pathway for integration with Outcome Tracker, or a comparable

platform with the minimum capacity and qualities offered with VistaShare's Outcome Tracker and meets the requirements and needs of the Program, as agreeable to HOPE, that ensures no delay in Program launch in first quarter 2026. ~~This is to ensure uniformity among program participant population.~~

1.3 Scope of Work (Section 1.3(1)(C)(xi))

- (xi) Contractor shall create and maintain a user-friendly, multilingual mobile-optimized website that provides Program information and the ability to integrate with an online portal for Program participants through a hyperlink. ~~an eligibility portal, an eligibility tool, and an account dashboard.~~
- a) Within 30 days from date of Agreement execution, Contractor shall provide an outline draft and timeline for implementing a mobile-optimized website.
 - b) By January 31, 2026, Contractor shall deploy a live base model website with Program information, including but not limited to, a program overview and details about eligibility criteria, that shall be phased into a fully operational Program website to begin enrolling youth within first quarter 2026.
 - c) By March 1, 2026, Contractor shall have fully developed, maintained, and operational Program website with full integration to ~~the a~~ participant portal through the Outcome Tracker recordkeeping platform offered by VistaShare LLC, or a comparable platform with the minimum capacity and qualities offered with VistaShare's Outcome Tracker, and meets the requirements and needs of the Program, as agreeable to HOPE. This website shall also include, but not be limited to, a fully updated mobile-optimized, HOPE-branded website with multilingual capabilities, a user-friendly interface, and integration with Outcome Tracker, or an alternative online recordkeeping platform as described above, for youth to login securely and access Program account information and balances, and an option to contact technical assistance. HOPE will own any data and platform.
 - d) For future Program conversions, Contractor shall ensure that all data elements will transition to HOPE and new contractor with no interruption of service.

Section 1.3 Scope of Work (pages 2-5 of 19) is modified to add subsection D to Section 1.3(1) entitled Potential Reporting Services.

D. Potential Reporting Services

- (i) In the future, the Program may request that the selected Contractor provide advice and services regarding financial reporting at the federal and/or state level to support reporting needs or requirements, in addition to the services defined above in subsection A-C.

Section 1.4 Term of Agreement (page 5 of 19) is modified to provide clarification around the revision to add a subsection D to Section 1.3(1) as described above.

1.4 Term of Agreement

The term of the Agreement entered pursuant to this RFP, if any, will be for a three-year period beginning October 31, 2025, or upon approval by the Department of General Services (whichever is later), through October 30, 2028, and shall not exceed \$1,150,000. The California HOPE Program shall have three options to extend the Agreement by an additional one-year term and up to \$250,000 per year. The Agreement shall not exceed \$1,900,000.00 for the entire term, including all optional extensions. Unless otherwise agreed upon, the total cost of the services described above are for services outlined in Section 1.3, Scope of Work(1), subsections A-C. The total cost of other potential reporting services described in Section 1.3(1)(D) shall not exceed \$250,000. This Agreement is subject to the approval of the Department of General Services (DGS). In no event shall services be performed prior to the approval of the agreement by the DGS Office of Legal Services.

Since there are revisions to the Scope Overview, Scope of Work, and Term of Agreement in Sections 1.2, 1.3, and 1.4 respectively, the corresponding sections are also updated in Exhibit A in the Sample Standard Agreement to this RFP.

If you have any questions regarding this addendum, or should you require any clarifying information, the contact person for this RFP is:

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Please note that no verbal information provided will be binding upon the State unless such information is issued in writing as an official addendum. Thank you.