



**California Health Benefit Exchange
(Covered California)
RFP 2015-05: African American Enrollment Initiative**

July 21, 2015

Table of Contents

1.	INTRODUCTION.....	4
1.1	Overview.....	4
1.2	Key Action Dates	4
1.3	Contact	4
1.4	Contract Amount.....	4
1.5	Submission of Final Proposals.....	4
1.6	Format of Proposals.....	6
1.7	Rejection of Proposals	6
1.8	Errors in Final Proposals.....	7
1.9	Protest	7
1.10	Disposition of Bids	8
1.11	Contract Execution and Performance.....	8
1.12	Subsequent Solicitation	8
1.13	Addition or Subtraction of Services.....	9
2.	MINIMUM QUALIFICATIONS	10
2.1	Respondent's Minimum Qualifications.....	10
2.2	Reassignment of Personnel.....	10
3.	SCOPE OF WORK	11
3.1	Background.....	11
3.2	Reference Documents	13
3.3	Project Tasks	13
3.4	Contract Completion Criteria.....	14
3.5	Deliverable Acceptance Criteria.....	14
3.6	Contractor Roles and Responsibilities	14
3.7	Covered California's Roles and Responsibilities.....	15
3.8	Project Assumptions and Constraints	15
3.9	Contract Amendment.....	16
3.10	Payment and Invoicing	16
4.	PROPOSAL RESPONSE CONTENT	17
4.1	Proprietary Information	17
4.2	Administrative Requirements.....	17
4.3	Technical Requirements	18

5.	REVIEW OF FINAL PROPOSALS FOR AWARD/SELECTION CRITERIA	21
5.1	Interviews.....	21
5.2	Evaluation Criteria.....	21
5.3	Cost Score	23
6.	PREFERENCE PROGRAMS.....	24
6.1	Small Business (SB) Preference.....	24
6.2	Disabled Veteran Business Enterprise (DVBE) – Declaration & Program Incentive.....	24

1. INTRODUCTION

1.1 Overview

You are invited to review and respond to this Request for Proposal (RFP). To submit a proposal to provide the requested services, you must comply with the instructions contained in this document as well as the requirements stated in the Scope of Work (SOW), Contractor Response Guidelines, and Attachment 2-D: Cost Worksheet. By submitting an offer, your company agrees to the terms and conditions stated in this RFP.

Read this document carefully. Responses to this RFP must be submitted to the California Health Benefit Exchange (Covered California) contact noted in Section 1.3 below.

1.2 Key Action Dates

Contractors are advised of the key dates and times shown below and are expected to adhere to them. All times noted in this document are Pacific Standard Time (PST).

KEY ACTION DATES

Request for Proposal Release Date:	July 9, 2015 before 5:00pm
Bidders Conference:	July 14, 2015 2:00 pm
Proposals Due Date:	July 29, 2015 by 3:00pm PST
Interviews:	August 5 - 6, 2015
Notice of Intent to Award:	August 10, 2015 by 5:00pm
Estimated Term Dates:	September 1, 2015 – June 30, 2016

1.3 Contact

Adam Odabashian
California Health Benefit Exchange
E-mail address: HBEXSolicitation@covered.ca.gov

1601 Exposition Blvd.
Sacramento, CA 95815

Five (5) copies of the Final Proposal are due by the stated deadline to the contact at the mailing address indicated in Section 1.3.

1.4 Contract Amount

Responses shall not exceed **\$500,000.00** in total costs. Responses that exceed this amount will not be considered for selection.

1.5 Bidders Conference

*Covered California will conduct a **voluntary**, pre-proposal Bidders' Conference Webinar on July 14, 2015, from 2:00 p.m. to 4:00 p.m. Prospective Bidders are not required, but*

are strongly encouraged to participate. The purpose of the meeting is for Covered California to give an overview of itself, discuss the RFP process, and provide prospective Bidders with an opportunity to ask questions about preparing and submitting proposals. However, to participate, prospective Bidders are **required to register for the meeting via email to HBEXSolicitation@covered.ca.gov by July 13, 2015, at 3:00 p.m.** The agency, name(s) of those attending, and contact information should be clearly identified. No evaluations will be made at this webinar and no affirmations will be provided to the Bidders. The login information will be sent to those who registered prior to the webinar. Questions sent in advance will be answered at the Bidders' Conference and must be submitted via email to HBEXSolicitation@covered.ca.gov by July 13, 2015, at 3:00 p.m. Remarks and explanations expressed during the Bidders' Conference do not take precedence over the written provisions in the RFP documents and are not binding unless confirmed in writing by Covered California and posted on the HBEX website.

1.6 Submission of Final Proposals

1. Preparation: Proposals are to be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of this RFP. Expensive bindings, colored displays, promotional materials, etc., are not necessary or desired. Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to the RFP requirements, completeness and clarity of content.
2. Bidder's Cost: Costs for developing proposals or attending Bidder conferences are entirely the responsibility of the Bidder and shall not be chargeable to Covered California.
3. Completion of Proposals: Proposals must be complete in all respects as described in the requirements established within the RFP. A Final Proposal may be rejected if it is conditional or incomplete, or if it contains any alterations of form or other irregularities of any kind. A Final Proposal must be rejected if any such defect or irregularity constitutes a material deviation from the RFP requirements as determined by Covered California in its sole discretion. The Final Proposal must contain all items required in the RFP.
4. False or Misleading Statements: Proposals which contain false or misleading statements, or which provide references which do not support an attribute or condition claimed by the Bidder, may be rejected. If, in the opinion of Covered California, such information was intended to mislead Covered California in its evaluation of the proposal, and the attribute, condition, or capability is a requirement of this RFP, it will be the basis for rejection of the proposal.

Issuance of this RFP in no way constitutes a commitment by the State of California to award a contract. Covered California reserves the right to reject any or all offers received if Covered California determines that it is in Covered California's best interest to do so. Covered California may reject any offer that is conditional or incomplete. Assumptions made by the Bidder in responding to this RFP do not obligate Covered California in any way. Additionally, assumptions may make the offer conditional and be cause for the offer to be rejected. Responses to this RFP will be assessed based on determining the "Best Value" and the selection, if made, may be awarded to multiple bidders with the total

amount of all awards not to exceed \$500,000.00. The SOW and bid(s) will be made a part of the resulting Contract(s).

1.7 Format of Proposals

This RFP requires Bidder(s) to submit a final phase proposal(s) that shall contain all required Administrative and Technical Attachments and Exhibits and submitted in a sealed envelope or container when shipped to Covered California by the dates and times shown in Section 1.2 Key Dates. The sealed package must be plainly marked with the (1) RFP number and title, (2) Bidder name and address, and (3) must be marked with "DO NOT OPEN", as shown in the following example:

RFP 2015-05: African American Enrollment Initiative
Attention: Adam Odabashian
California Health Benefit Exchange
1601 Exposition Blvd.
Sacramento, CA 95815
DO NOT OPEN

Hardcopy proposals shall be on standard 8 ½" x 11" paper. Electronic versions shall be stored in a Covered California-designated central repository and remain the sole property of Covered California.

Bidder shall submit FIVE (5) sets of copies for all Administrative/Technical Attachments and Exhibits in the sealed Envelope or Container. In the Bidder's best interest, one (1) set should be titled as being the "Master Copy" and the remaining four (4) as additional copies. Bidder shall also provide a CD-ROM with the appropriate Administrative and Technical Attachments and Exhibits in searchable text format (e.g., Word, searchable PDF). Each copy shall be titled and unbound including the additional copies.

Bids not submitted under sealed cover will be rejected.

1.8 Rejection of Proposals

Deviations, whether or not intentional, may cause a proposal to be non-responsive and not considered for award. Covered California may reject any or all proposals and may waive any immaterial deviation or defect in a proposal. Covered California's waiver of any immaterial deviation or defect shall in no way modify the RFP documents or excuse the Bidder from full compliance with the RFP specifications if awarded a contract. **FINAL PROPOSALS NOT RECEIVED BY THE DATE AND TIME SPECIFIED IN SECTION 1.2 KEY ACTION DATES OR NOT SEALED**, remain unopened and be maintained by the Contact listed in Section 1.3 separately from proposals that have been timely received.

Proposals received after expiration of the deadline shall not be submitted to the Evaluation Team nor considered except upon written approval of the Chief Deputy Executive Director, or his/her authorized designee, specifying the reason(s) for acceptance and consideration of the proposal(s) received after expiration of the deadline.

1.9 Errors in Final Proposals

An error in the Final Proposal may cause the rejection of that proposal; however, Covered California may, **AT ITS SOLE OPTION**, retain the proposal and make certain corrections. In determining if a correction will be made, Covered California will consider the conformance of the proposal to the format and content required by the RFP, and any unusual complexity of the format and content required by the RFP.

1. If the Bidder's intent, as determined by Covered California, is clearly established based on review of the complete Final Proposal submittal, Covered California may at its sole option correct an error based on that established intent.
2. Covered California may at its sole option correct obvious clerical errors.
3. A Bidder may modify a bid after submission by withdrawing its original bid and resubmitting a new bid prior to the bid submission deadline. Bidder modifications offered in any other manner, oral or written, will not be considered.
4. A Bidder may withdraw its bid by submitting a written withdrawal request to Covered California, signed by the Bidder or an authorized agent. A Bidder may thereafter submit a new bid prior to the bid submission deadline. Bids may not be withdrawn without cause subsequent to bid submission deadline.
5. Covered California may modify the RFP prior to the bid submission deadline by the issuance of an addendum to the website.
6. Covered California reserves the right to reject any bid that does not satisfy the requirements set forth in the RFP. Covered California is not required to award a contract. Before submitting a response to this RFP, Bidders should review, correct all errors, and confirm compliance with the RFP requirements.
7. All proposals must be based on the Model Contract provided with this solicitation (Scope of work provided in Section 3, and contract General Terms and Conditions provided in Attachment 2). Bidders must submit as part of their response any exceptions to the Model Contract that they wish to negotiate. Bidder exceptions must be documented in an attachment labeled "Proposal Contract Exceptions." All Model Contract exceptions must be included in the Bidder Proposal at the time of its submission. No additional exceptions may be presented during contract negotiations.
8. No oral understanding or contract shall be binding on either party.

1.10 Protest

A protest may be submitted according to the procedures set forth below. If a Bidder has submitted a proposal which it believes to be totally responsive to the requirements of the solicitation process and believes the Bidder should have been selected, according to Section 5.3 - Evaluation Criteria, and the Bidder believes Covered California has incorrectly selected another Bidder for the award, the Bidder may submit a protest of the selection as described below. Protests regarding selection of the "successful Bidder" will be heard and resolved by Covered California's Executive Director.

All protests must be made in writing, signed by an individual who is authorized to contractually bind the Bidder, and contain a statement of the reason(s) for protest, citing the law, rule, regulation, or procedures on which the protest is based. The protester must provide facts and evidence to support their claim. Certified or registered mail must be used unless delivered in person, in which case the protester should obtain a receipt of delivery. The final day to receive a protest is five (5) business days after Bidder selection. Protests must be mailed or delivered to:

Mailing Address:
California Health Benefit Exchange
Attn: Peter Lee, Executive Director
1601 Exposition Blvd.
Sacramento, CA 95815

1.11 Disposition of Bids

Upon bid opening, all documents submitted in response to this RFP will become the property of the State of California. All documents submitted in response to this RFP will become the property of the State of California. Government Code Section 100508(a) exempts from disclosure under the Public Records Act all deliberative processes, communications, or portions of negotiations with entities contracting or seeking to contract with Covered California and entities with which Covered California is considering a contract. Records that are exempt from release pursuant to Government Code Section 100508 include, but are not limited to, score sheets and proposals submitted by Bidders for any purpose, and any evaluation documents.

1.12 Contract Execution and Performance

Performance shall start no later than the express date set forth in the RFP by Covered California after all approvals have been obtained and the contract is fully executed. Should the Contractor fail to commence work at the agreed upon date and time, Covered California, upon five (5) days written notice to the Contractor, reserves the right to terminate the contract. In addition, the Contractor shall be liable to Covered California for the difference between Contractor's bid price and the actual cost of performing work by the replacement contractor.

All performance under the contract shall be completed on or before the termination date of the contract.

1.13 Subsequent Solicitation

At the Covered California's sole discretion, after the contract award has been made and the contract has been executed, if the contract is terminated with or without cause after performance has begun, Covered California may engage the next-highest-ranked Bidder without performing a subsequent solicitation.

1.14 Addition or Subtraction of Services

Notwithstanding that bids have been submitted, at Covered California's sole discretion, the scope of work may be modified to add or remove services through an addendum. If bids have been submitted at the time Covered California posts the addendum, Covered California may restrict responses to the addendum so that only those entities that have submitted bids in response to the initial RFP may respond to the addendum with the modified services.

2. MINIMUM QUALIFICATIONS

2.1 Respondent's Minimum Qualifications

To support the community-based outreach efforts with a focus on education and enrollment into Covered California health plans, the individual, firm or team must demonstrate:

- a. Familiarity with Covered California and our mission;
- b. Professional recommendations and services specific to the under-served community being targeted, including, but not limited to:
 - i. African American
- c. Successful strategies and tactics in the community being targeted;
- d. Familiarity and success in the community being targeted;
- e. Familiarity and success marketing insurance products.

2.2 Reassignment of Personnel

1. The Contractor shall not reassign personnel assigned to the contract during the term of the contract without prior written approval of Covered California. If a Contractor employee is unable to perform duties due to illness, resignation, or other factors beyond the Contractor's control, the Contractor shall make every reasonable effort to provide suitable substitute personnel.
2. Substitute personnel shall not automatically receive the hourly rate of the individual or position being replaced. Covered California and the Contractor shall negotiate the hourly rate of any substitute personnel to the contract. The hourly rate negotiated shall be dependent, in part, upon the experience and individual skills of the proposed substitute personnel. The negotiated rate cannot exceed the hourly rate stated in the contract.
3. Covered California reserves the right to request a Contractor employee be removed from performing any work on the contract and upon written notice to the Contractor, the Contractor shall assign a substitute employee.

3. SCOPE OF WORK

3.1 Background

Soon after the passage of national health care reform through the Patient Protection and Affordable Care Act of 2010 (ACA), California became the first state to enact legislation to establish a qualified health benefit exchange. The California state law is referred to as the California Patient Protection and Affordable Care Act (CA-ACA).

The goals and objectives of Covered California are to:

- Reduce the number of uninsured Californians by creating an organized, transparent marketplace for Californians to purchase affordable, quality health care coverage to claim available federal tax credits and cost-sharing subsidies, and to meet the personal responsibility requirements imposed under the federal act (ACA);
- Strengthen the health care delivery system;
- Serve as an active purchaser, including creating competitive processes to select participating carriers and other contractors;
- Require that health care service plans and health insurers issue coverage in the individual and small employers markets and compete on the basis of price, quality, and service (and not on risk selection); and
- Meet federal and state law requirements, guidance and regulations.

Covered California is an independent public entity within California State Government. It is governed by a five member board appointed by the Governor and Legislature. Four of the members are appointed for four year terms, two by the Governor, one by the Senate Rules Committee and one by the Speaker of the Assembly. The California Secretary of Health and Human Services is a voting ex-officio member of the Board. The Board elected the California Secretary of Health and Human Services Agency as Chair, signaling its intention to actively coordinate and collaborate with existing state agencies involved in providing health coverage to Californians.

Covered California works in close partnership with the:

- Department of Health Care Services, which oversees and administers the California's Medicaid Program (Medi-Cal) and other specifically focused health programs;
- The two agencies that regulate health insurance in California, the Department of Managed Care and Department of Insurance; and
- A broad range of stakeholders whose constituencies will be impacted by health care reform.

The purpose of this RFP is to procure proposals from qualified vendors for conducting outreach to and supporting enroll of the 130,000+ subsidy eligible African Americans in the state of California.

Covered California ended its second open enrollment period with four percent of those who selected plans being African American. This landed close to the five percent African American representation in the state's subsidy eligible population.

The successful proposals for this RFP will help African American communities in 2015-16 comprise five percent of Covered California's actively covered population by including strategies to:

- Create enrollment opportunities/events/strategies for Covered California's Navigator program and that augment and coordinate with existing Navigator strategies
- Provide advice, counsel and recommendations to Covered California regarding reaching targeted segments, especially African American segments and their key target users
- Identify and develop opportunities for Covered California Navigators to conduct outreach and enrollment of key target users with special emphasis on African American segments
- Present an implementation strategy to maximize education and enrollment which complements the larger marketing effort as well as the larger community-based enrollment efforts
- Identify, recruit, and enlist the support of community influencers and celebrities to endorse the value of having health coverage and to encourage enrollment
- Identify and forge community partnerships that result in target segment education and enrollment opportunities, enhanced stakeholder and public perception of Covered California's commitment to enrolling target communities- demographic and geographic
- Promote open enrollment; recommend locations central and known in the community being targeted

Additionally, Successful proposals will establish a nexus between target rich communities identified by Covered CA and contractor; enrollment carried out by navigators and certified insurance agents; and outreach, education, and publicity provided by the contractor.

Covered California is also pursuing through this RFP tactics and partnerships that result in outcomes such as, but not limited to:

- Storefronts and regular office hours for new enrollment
- Leveraging of community centers and schools as enrollment sites within target rich communities
- Publicity and signage for enrollment sites
- Promotion of health coverage utilization in coordination with health plans
- An understanding of Covered California's perception and reputation in African American communities and sharing feedback from members of the targeted community

Covered California reserves the right to retain the services of the organization resulting from this RFP to assist with other related activities and projects embarked upon by Covered California during the established contract period, or through a contract amendment.

Read this document carefully. Responses to this RFP must be submitted to Covered California contact noted in Section 1.3.

3.2 Reference Documents

For additional information about the Covered California and previous solicitations, please visit: <http://hbex.coveredca.com/solicitations/>

3.3 Project Tasks

The following brief Statement of Work outlines Covered California's overall expectations. Potential Bidders will be asked to develop their own, more detailed approach in response to this RFP.

- a. Create and present integrated strategy for African American enrollment including marketing, communications, Navigators, community partners, sponsorships, events
- b. Complement enrollment opportunities/events/strategies for Covered California's Navigator program and that augment and coordinate with existing Navigator strategies such as but not limited to:
 - a. Local print and radio advertising
 - b. Presentations to African American focused conferences, town halls, community health events
 - c. Education and enrollment events targeting small businesses; emphasis on hair salons/barbershops, restaurants, entertainment
- c. Provide advice, counsel and recommendations to Covered California regarding maximizing enrollment and enhancing outreach and education of the African American segment of consumers with special emphasis on the following geographic regions:
 - a. Alameda County
 - b. Contra Costa County
 - c. Inland Empire- San Bernardino, Riverside, Rialto communities
 - d. Los Angeles County (west of Los Angeles River and south of Sunset Blvd.)
 - e. Los Angeles County- Antelope Valley, Pasadena communities
 - f. Sacramento County
 - g. Santa Clara County
 - h. San Diego County
- d. Understanding Covered California's perception and reputation in African American communities, sharing feedback from targeted communities, and developing tactics and partnerships that result in outcomes promoting African American enrollment such as, but not limited to:
 - a. Storefronts and regular office hours for new enrollment
 - b. leveraging of community centers and schools as enrollment sites within target rich communities
 - c. Publicity and signage for enrollment sites
 - d. Promotion of health coverage utilization in coordination with health plans
- e. Identify and develop enrollment opportunities for African Americans
 - a. Recurring, publicized and calendared enrollment events
 - b. High profile enrollment/education events
 - c. High touch enrollment strategy
- f. Create and develop value proposition targeting African American enrollment

- g. Identify, recruit, enlist celebrities and community influencers to persuade enrollment by using but not limited to radio, video, social media and public appearances as platforms for message delivery
- h. Foster and forge partnerships with groups known for African American outreach and education
- i. Identify, recruit applicants for sponsorship RFP; coordinate Covered California's participation in selected sponsorship events
- j. Present strategies for education and enrollment to the California legislators, stakeholder boards, advisory committees and community organizations

3.4 Contract Completion Criteria

The contract resulting from this RFP will be considered complete when Covered California's Project Manager has approved and accepted all assigned contract deliverables.

3.5 Deliverable Acceptance Criteria

All concluded work must be submitted to Covered California for review and approval or rejection. Payment for all tasks performed under this Statement of Work will be based on time and materials as agreed upon and directed by work orders approved by Covered California before the start of work. It will be Covered California's sole determination as to whether any tasks have been successfully completed and are acceptable.

Throughout the contract, Covered California will review and validate services performed as indicated per work orders. In addition, Covered California's Project Manager will verify and approve the Contractor's invoices. Signed acceptance is required from the Covered California Project Manager to approve an invoice for payment.

Deliverable acceptance criteria consist of the following:

1. Deliverable work was completed as specified by work order and the final deliverable product or service was rendered.
2. Plans, schedules, designs, documentation, digital files, photographs and reports (deliverables) were completed as specified and approved.
3. All deliverable documentation and artifact gathering have been completed.
4. All deliverables are in a format useful to Covered California.
5. If a deliverable is not accepted, Covered California will provide the reason, in writing, within ten (10) business days of receipt of the deliverable.

3.6 Contractor Roles and Responsibilities

The Contractor shall:

1. Designate a person to whom all project communications may be addressed and who has the authority to act on all aspects of the contract for services. This person will be responsible for the overall project and will be the contact for all invoice and Contractor staffing issues.
2. Provide written reports for review and approval by Covered California and formally respond to Covered California review findings as necessary.

3. Meet weekly with Covered California staff to discuss progress.
4. Make its best efforts to maintain staff continuity throughout the life of the project. If, however, a substitution becomes necessary, the Contractor must submit a resume for review, in advance, of all proposed personnel substitutions. All Contractor personnel substitutions must be approved in writing by Covered California's Project Manager. Failure to receive the required approvals may result in termination of the contract.

3.7 Covered California's Roles and Responsibilities

Covered California shall:

1. Designate Covered California contact person (Project Manager) to whom all Contractor communications may be addressed and who has the authority to act on all aspects of the services. This person will review the contract and associated documents with the Contractor to ensure understanding of the responsibilities of both parties.
2. Provide access to business and technical documents as necessary for the Contractor to complete the tasks identified in this RFP.
3. Request, develop and review work orders for projects and project tasks before Contractor is to start work
4. Ensure appropriate resources are available to perform assigned tasks, attend meetings, and answer questions.
5. Ensure that decisions are made in a timely manner.
6. Provide work areas and meeting rooms as needed.
7. Identify and provide access to Subject Matter Experts to assist with the elaboration of technical requirements.

3.8 Project Assumptions and Constraints

1. The Contractor's work hours must be consistent with Covered California's key staff on-site, whose normal business hours are 8:00 AM to 5:00 PM PST, Monday through Friday, except for standard holidays.
2. Overtime rates will not be reimbursed under the contract.
3. Travel will not be reimbursed under the contract.
4. Contractor will respond to work orders and if requested by Covered California, assist with development of work orders.
5. Any modifications to tasks within the SOW of the contract will be defined, documented, and mutually agreed upon by the Contractor and Covered

California's Project Manager prior to starting work on the modified task. Amendments to the contract for tasks within the SOW are limited to an extension of time or tasks directly related to the SOW.

6. Covered California's Project Manager reserves the right to renegotiate the services deemed necessary to meet the needs of this project according to Covered California's priorities. Covered California and the Contractor must mutually agree to all changes. Renegotiated services outside the scope of the original contract will require contract amendment prior to commencement of work.
7. Covered California and the Contractor are mutually obligated to keep open and regular channels of communication in order to ensure the successful execution of this contract. Both parties are responsible for communicating any potential problem or issue to Covered California's Project Manager and the Contractor's engagement manager, respectively, within 48 hours of becoming aware of the problem.

3.9 Contract Amendment

Covered California may, at its sole discretion, extend the term of the contract for up to a maximum of 60 days. If mutually agreed upon by the State and the Contractor, this contract may be amended to include additional funding.

3.10 Payment and Invoicing

Payment to Contractor is contingent upon Covered California's receiving funding from the Federal government and the collection of fees assessed from the Qualified Health Plans. Covered California shall bear no liability or responsibility for payment to Contractor, even for services provided and delivered, in the event payment to Covered California from the Federal government or the collection of fees assessed from the Qualified Health Plans is delayed, suspended, or terminated.

The Contractor may invoice Covered California only after the successful completion and acceptance of the deliverables. The Contractor may not invoice Covered California for any costs exceeding the maximum amount identified to complete a deliverable.

4. PROPOSAL RESPONSE CONTENT

Final proposal requirements are contained in the following areas that are described in detail in subsequent sections of this document:

1. Administrative Requirements
2. Technical Requirements
 - a. Years of experience and qualifications specific to the community being targeted
 - b. Capacity of and the allocation of resources to the community being targeted
 - c. Knowledge of and familiarity with Covered California and our mission
 - d. Knowledge of engaged community based organizations, non-profits, providers, community clinics
 - e. Knowledge of media markets including; paid advertising, social media and earned media
 - f. Knowledge of the insurance market and the individual health insurance market specifically
 - g. Assumptions
3. Model Contract

4.1 Proprietary Information and Confidential Status of Responses

Any documentation submitted which has been marked “Proprietary” or “Trade Secrets” may not be accepted. Pursuant to Evidence Code Section 1040, Covered California will consider responses to this solicitation as “official information” acquired in confidence and will not disclose the information received as a public record, unless it is already available to the public, without receiving prior written permission from the Bidder.

4.2 Administrative Requirements

Final Proposals will be assessed on a pass/fail basis to verify compliance with all Administrative Requirements.

4.2.1 *All Final Proposals must be submitted within the timelines specified in Section 1.2 of this RFP, and shall include the following Administrative Requirements in this order:*

1. A cover letter signed by a person authorized to bind the company which also includes the company’s certification number(s) for SB and/or DVBE (if applicable).
2. A Certificate of Liability Insurance equal to or greater than \$1,000,000.
3. Proof of Workers’ Compensation Liability Insurance.
4. A signed Payee Data Record form STD. 204
5. A signed Federal Debarment Certification (Attachment 1-B).
6. A completed certification form showing, upon award of the contract, the Bidder agrees to provide a completed Title 22, California Code of Regulations 1230000 Statement of Economic Interests, Form 700 (Attachment 1-C).

4.3 Technical Requirements

In addition to the Administrative Requirements, all Final Proposals must include the following:

4.3.1 *Understanding and Approach*

At the heart of this solicitation is supporting a broad and diverse “sales force” in the enrollment of California’s African American consumers. The sales force is made up of our internal and external partners who work to spread the word about Covered California, but primarily sign up consumers across the state in clinics, at health fairs, in storefronts, over the phone, and at the consumer’s home, religious home, or workplace.

These partners are certified insurance agents, they are certified enrollment counselors, community partners, county eligibility workers and community partners like health clinics.

The successful proposal will present an innovative approach based on a mix of research, data and experience to create opportunities for the sales force to enroll African American consumers.

It will also propose how to use contracted African American centric work provided by the Covered California marketing and public relations contractors and their subcontractors to drive consumers to the Covered California sales force (no more than five pages).

- a. **Years of Experience and Qualifications:**
Include a description of the Bidder’s years of experience and qualifications specific to the under-served community being targeted. Provide the assumptions used to develop the response.
- b. **Knowledge of and Familiarity with Covered California:**
Describe Bidder’s knowledge of and familiarity with Covered California and our mission.
- c. **Knowledge of Engaged Community Based Organizations:**
Describe Bidder’s knowledge of and relationship with engaged community based organizations, non-profits, providers, community clinics, public figures with resonance among African American consumers.
- d. **Knowledge of Insurance Markets:**
Describe Bidder’s knowledge of the insurance market and the individual health insurance market specifically.

4.3.2 *Corporate Qualifications*

Describe and provide examples of the Bidder’s overall capacity and the allocation of resources to the community being targeted (no more than four pages).

4.3.3 *Engagement Team Qualifications and Resumes*

Describe the qualifications of each of the members of the proposed engagement team. Identify the role that each member is expected to play and describe the experience, education, knowledge, and skills each member possesses as it relates to community outreach and engagement, as well as to media markets including: paid advertising, social media, and earned media (no more than four pages).

Resumes of team members should be included with bidder's proposal as supplemental information in an attachment.

4.3.4 Past Projects Completed

Describe in a narrative no more than five (5) projects your corporation has completed in the last two years that relate to the tasks listed in the SOW (no more than four pages).

4.3.5 Assumptions

Document any assumptions the Contractor is making about the SOW, the responsibilities of the Bidder and Covered California, and any other issues that are relevant to the Bidder's Offer and ability to do the work for the proposed cost (no more than five pages).

4.3.6 Model Contract Response

The template for the model contract portion of the response is contained in Attachment 2. The Bidder will provide an updated statement of work using the tasks identified in Section 3 using track changes on Attachment 2.

Include a description of your understanding of the statement of work (Section 3). Emphasize your understanding of Covered California's objectives and the major activities that must be performed to complete the work. Describe the activities you will perform to complete the required work. Include your expectations of all entities outside your own team.

Provide a high-level work plan for this effort. The work plan must identify major activities, estimated start and end dates, and deliverable milestones. At a minimum, the work plan must map each primary task to a deliverable. The response must include any additional information that the Contractor deems necessary to explain how the Contractor intends to meet Covered California's requirements. Include the following as appropriate (maximum of 25 pages, including charts, tables, and graphs):

1. Overview of the required tasks and outcomes.
2. Description of how tasks will be performed.
3. Work plan for each task.
4. Samples of work from other projects, or outlines of what deliverables are proposed for the required tasks.

Exhibit B is the budget and payment provisions portion of the contract. Using the cost worksheet, Attachment 2-D, bidders should update Exhibit B with this information where indicated in red italics text.

Provide costs by fiscal year in table consistent with the one shown in Attachment 2-D. Provide hours by individual by week and/or total deliverable cost. Provide the cost per hour to be used as the basis for any additional work, should the agreement be amended as described in the General Provisions section of this RFP.

1. The Cost Worksheet has been provided as a Microsoft Word Document. Contractors are to complete the Worksheet using the provided template. List the tasks and deliverables outlined in your work plan. Identify each resource that will be assigned to a task, including the resource's hourly rate, the estimated number of hours that the resource is expected to expend on the task, and total cost.

Each primary task is expected to result in one or more deliverables, but many sub-tasks may not be associated with a specific deliverable.

5. REVIEW OF FINAL PROPOSALS FOR AWARD/SELECTION CRITERIA

5.1 Interviews

Interviews may be conducted with up to three of the highest-rated Bidders. The exact number of Bidders interviewed is entirely at the discretion of Covered California. The specific staff to be interviewed will be agreed upon between Covered California and the Bidder at the time the interview is scheduled.

5.2 Evaluation Criteria

Evidence of extensive previous experience in similar complex, short deadline efforts will receive significant consideration in the evaluation process, as will demonstrated experience related to the Scope of Work.

The table below lists the evaluation categories and the weights each will carry in the overall evaluation of each offer:

Criteria	Weight	Points
Administrative Requirements	Pass / Fail	Pass / Fail
Understanding and Approach	30%	300
Corporate Qualifications	10%	100
Engagement Team Qualifications and Resumes	20%	200
Past Projects Completed	10%	100
Cost	30%	300
Totals	100%	1000

Preference Programs if applicable	Points
Small Business	15
DVBE Participation 5% or Over	15
DVBE Participation 4% to 4.99% inclusive	12
DVBE Participation 3% to 3.99% inclusive	9
DVBE Participation 2% to 2.99% inclusive	6
DVBE Participation 1% to 1.99% inclusive	3

The highest-rated response after applying the weighted evaluation criteria described above shall be recommended for selection. If two or more of the highest-rated responses are evaluated as substantially equal after applying the weighted evaluation criteria described above, then the lowest cost response shall be recommended for selection.

Covered California Evaluation Team will evaluate Bidder proposals in the six areas of requirements:

1. Years of experience and qualifications specific to the under-served community being targeted
2. Projected staffing, resources, and their allocation to fulfill the proposal, along with current staffing, resources and their allocation to the target communities
3. Knowledge of and familiarity with Covered California and our mission

4. Knowledge of and relationships with engaged community based organizations, non-profits, providers, community leaders, public figures with resonance among African American consumers
5. Knowledge of media markets including; paid advertising, social media and earned media
6. Knowledge of the insurance market and the individual health insurance market specifically

5.2.1 Understanding and Approach

Scoring of this factor shall be based upon the Evaluation Team's assessment of the following:

- a. Proposals will be scored on how well they demonstrate the contractor's capability and approach that will likely result in activities that improve African American enrollment.
- b. Knowledge of and Familiarity with Covered California
Describe Bidder's knowledge of and familiarity with Covered California and our mission.
- c. Knowledge of Engaged Community Based Organizations
Describe Bidder's knowledge of and relationship with engaged community based organizations, non-profits, providers, community clinics, public figures with resonance among African American consumers.
- d. Knowledge of Insurance Markets
- e. Describe Bidder's knowledge of the insurance market and the individual health insurance market specifically.

5.2.2 Corporate Qualifications

Covered California seeks a Bidder with resources to recommend, and execute, strategies which maximize education and enrollment with the community being targeted while complementing the larger marketing effort and the community-based enrollment effort already in place.

5.2.3 Engagement Team Qualifications and Resumes

Covered California seeks a Vendor with experience and knowledge of community engagement and outreach, as well as access to local media outlets which resonate with the community being targeted, for the purposes of promoting Covered California's education and enrollment opportunities. Please include a list of personnel, number of years of experience, cost per hour, and percentage of time that listed personnel will be dedicated to the project, along with resumes for each listed personnel member.

5.2.4 Past Projects Completed

Scoring of this factor will be based upon the Evaluation Team's assessment of the breadth, depth, and relevance to the Scope of Work requirements, as well as corporate resources and capacity as indicated by the characteristics projects previously completed. Evaluators will assign scores based upon information contained in the Past Projects Completed narrative.

5.2.5 Scoring Criteria

Evaluators will assign technical points to all categories using these scoring criteria:

Rating	Relation to Requirements	Strengths	Deficiencies	Weaknesses	Likelihood of Success	Score
Excellent	Superior attainment of all requirements	Numerous and significant in key areas	None	Minor, if any	Very High	10.0
Good	Expected to meet all requirements	Some and significant in key areas	None	Minor, but are far outweighed by strengths	High	7.5
Acceptable	Capable of meeting all requirements	Some in non-key areas	Minor	Minor, but are outweighed by strengths	Fair	5.0
Marginal	May not be capable of meeting all requirements	None, or some that are outweighed by weaknesses or deficiencies	Significant	Significant	Poor	2.5
Unacceptable	Not likely to meet all requirements	None, or some that are far outweighed by weaknesses or deficiencies	Needs major revision	Needs major revision	None	0

5.3 Cost Score

Cost (300 points)

Each Bidder's cost score will be calculated based on the ratio of the lowest cost proposal to the Bidders' cost, multiplied by the maximum number of cost points available (300), as shown in the calculation below. Award of the contract will be issued to the overall best value, not necessarily the lowest bidder.

$$\frac{\text{Lowest Total Cost Bid}}{\text{Bidder Total Cost}} \times \text{Total cost points available}$$

Example: To help illustrate this process, refer to table below, for an example of the cost score calculation process. **Cost figures in the example below explain the calculations and have no other significance.**

Cost Evaluation and Scoring Methodology Example

Bidder	Grand Total Cost	Calculation	Cost Points Awarded
A	\$400,000	$\frac{\$300,000}{\$400,000} \times 300$	225
B	\$350,000	$\frac{\$300,000}{\$350,000} \times 300$	257
C	\$300,000	$\frac{\$300,000}{\$300,000} \times 300$	300

		\$300,000	
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6. PREFERENCE PROGRAMS

6.1 Small Business (SB) Preference

This RFP does not require Bidders to meet the minimum SB participation percentage or goal. However, Bidders are encouraged to sub-contract with SBs.

1. Small Business Preferences: Bidders claiming the 5% preference must be certified by California as a small business or must commit to subcontract at least 25% of the net bid price with one or more California Certified Small Businesses (CCSB). Certification must be obtained no later than 5:00 p.m. on the bid due date.

Section 14835, et seq. of the California Government Code (GC) requires a 5% preference be given to bidders who qualify as a SB. The rules and regulations of this law, including the definition of a small business for the delivery of goods and services, are contained in California Code of Regulations (CCR's), Title 2, Section 1896, and et seq. The SB preference is for California-based Certified SB only.

To claim the CCSB preference, which may not exceed 5% for any bid, the Bidder must have its principal place of business located in California, have a complete application (including proof of annual receipts) on file with the State Office of Small Business and DVBE Services (OSDS) by 5:00 p.m. on the bid due date (see Section 1.2) and be verified by such office.

6.2 Disabled Veteran Business Enterprise (DVBE) – Declaration & Program Incentive

This RFP does not require Bidders to meet the minimum DVBE participation percentage or goal. However, a Bidder must complete and submit the **Bidder Declaration – Attachment 1-I** with its proposal package. Failure to complete and submit the required attachment as instructed may render the bid non-responsive. Pursuant to Military and Veterans Code Section 999.2, each State department has a participation goal of not less than 3% for disabled veteran business enterprises. These goals apply to the overall dollar amount expended each year by the awarding department.

6.2.1 Commercially useful function

Only State of California, Office of Small Business and DVBE Services (OSDS), certified DVBEs who perform a Commercially Useful Function (CUF) relevant to this solicitation may be used to satisfy the DVBE participation goal. The criteria and definition for performing a CUF are below. When responding to this RFP, Bidders will need to verify each DVBE subcontractor's certification with OSDS to ensure DVBE eligibility.

CUF Definition California Code of Regulations, Title 2, § 1896.61(l): The term "DVBE contractor, subcontractor or supplier" means any person or entity that satisfies the ownership (or management) and control requirements of §1896.61(f); is certified in

accordance with §1896.70; and provides services or goods that contribute to the fulfillment of the contract requirements by performing CUF.

As defined in Military Veterans Code §999, a person or an entity is deemed to perform a "CUF" if a person or entity does **all** of the following:

1. Is responsible for the execution of a distinct element of the work of the contract.
2. Carries out the obligation by actually performing, managing, or supervising the work involved.
3. Performs work that is normal for its business services and functions.
4. Is not further subcontracting a portion of the work that is greater than that expected to be subcontracted normal industry practices.

A contractor, subcontractor, or supplier will not be considered to perform a CUF if the contractor's, subcontractor's, or supplier's role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of DVBE participation.

Attachment 1

1-A: Proposal Checklist

1-B: Federal debarment, suspension, ineligibility and voluntary exclusion – certification

1-C: FORM 700 Statement of Economic Interest Certification

1-D: Payee Data Record

1-E: DVBE Declaration

1-F: Bidder Declarations

Attachment 2

- 2-A: Standard 213
- 2-B: Exhibit A – Scope of Work
- 2-C: Exhibit B – Budget Provisions
- 2-D: Exhibit B – Attachment 1, Cost Worksheet
- 2-E: Exhibit C – General Terms and Conditions
- 2-F: Exhibit D – Special Terms and Conditions
- 2-G: Exhibit E – Additional Provisions