California Health Benefit Exchange

HBEX 19: Request for Proposals

Request for Offer for Health Care Training variety of audiences; focus group testing of program materials; written translations of program materials and readability of materials

March 12, 2013

560 J Street, Suite 290, Sacramento, CA 95814
www.healthexchange.ca.gov

Table of Contents

1. INTRODUCTION

1.1 Overview

You are invited to review and respond to this Request for Offer (RFO). To submit an offer 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 RFO.

This is a deliverables-based contract for the following services:

- ***Health Care Training Program for a variety of different audiences***
- ***Readability for health care program materials***
- ***Focus group testing of program materials***
- ***Written translations of program materials in a variety of different languages***

Read this document carefully. The Offer due date is March 29, 2013 by close of business (5:00pm). Responses to this RFO must be submitted to the California Health Benefit Exchange (Exchange) contact noted in Section 1.3 below.

Issuance of this RFO in no way constitutes a commitment by the State of California to award an agreement. The Exchange reserves the right to reject any or all offers received if the Exchange determines that it is in the Exchange's best interest to do so. The Exchange may reject any offer that is conditional or incomplete. Responses to this RFO will be assessed based on determining the "Best Value" and the selection, if made, will be to a single Bidder. The SOW in this RFO and the Offer will be made a part of the resulting Agreement.

1.2 Key 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

Release RFO Date:	**March 12, 2013**
Questions Due Date:	**March 15, 2013 by Noon**
Response to Questions Due Date:	**March 21, 2013 by COB (5:00pm)**
Offer Due Date:	**March 29, 2013 by COB (5:00pm)**
Notice of Intent to Award	**April 5, 2013 by COB (5:00pm)**
Estimated Term Dates:	**April 12, 2013 through June 30, 2014**

1.3 Contact

Kelly Long
California Health Benefit Exchange
E-mail address: hbexsolicitation@covered.ca.gov

560 J Street, Suite 290
Sacramento, CA 95814

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

1.4 Bidder's Questions

Bidders shall submit any questions regarding this RFO by the due date specified in the Key Action Dates table in Section 1.2. Only e-mail inquiries addressed to the contact person listed Section 1.3 will be accepted. Bidders shall provide specific information to enable the state to identify and respond to their questions. When submitting inquiries, please reference this RFO number (HBEX19). At its discretion, the Exchange may contact an inquirer to seek clarification of any inquiry received. Bidders that fail to report a known or suspected problem with the RFO or fail to seek clarification and/or correction of the RFO, shall submit an Offer at their own risk.

1.5 Submission of Final Offers

1. Preparation: Offers are to be prepared in such a way as to provide a straightforward, concise description of capabilities to satisfy the requirements of this RFO. Expensive bindings, colored displays, promotional materials, etc., are not necessary or desired. Emphasis should be on conformance to the RFO instructions, responsiveness to the RFO requirements, and completeness and clarity of content.

2. Bidder's Cost: Costs for developing Offers or attending Bidder conferences are entirely the responsibility of the Bidder and shall not be chargeable to the Exchange.

3. Completion of Offers: Offers must be complete in all respects as described in the requirements established within the RFO. A Final Offer 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 Offer must be rejected if any such defect or irregularity constitutes a material deviation from the RFO requirements. The Final Offer must contain all items required in the RFO.

4. False or Misleading Statements: Offers 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 the Exchange, such information was intended to mislead the Exchange in its evaluation of the Offer, and the attribute, condition, or capability is a requirement of this RFO, it will be the basis for rejection of the Offer.

1.6 Format of Offers

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

RFO HBEX19 "DO NOT OPEN"
Consultant Services –Health Care Staff Training Program
Attention: Kelly Long
California Health Benefit Exchange
560 J Street, Suite 290
Sacramento, CA 95814

Hardcopy offers shall be on standard 8 ½" x 11" paper. Electronic versions shall be stored in an Exchange-designated central repository and remain the sole property of the Exchange.

Bidder shall submit a minimum of five (5) sets of copies for all Administrative/Technical Attachments and Exhibits in the sealed Envelope/Container and these copies should not contain any references to pricing. Under separate envelope/container the bidder shall submit attachment 2D, Cost Worksheet with their Best And Final Offer (BAFO) pricing. In the bidder 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.

1.7 Rejection of Offers

Deviations, whether or not intentional, may cause an offer to be non-responsive and not considered for award. The Exchange may reject any or all offers and may waive any immaterial deviation or defect in an offer. The Exchange's waiver of any immaterial deviation or defect shall in no way modify the RFO documents or excuse the Bidder from full compliance with the RFO specifications if awarded a contract. **FINAL OFFERS NOT RECEIVED BY THE DATE AND TIME SPECIFIED BY KEY ACTION DATES, listed in Section 1.2, OR NOT SEALED, WILL BE REJECTED.**

1.8 Errors in Final Offers

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

1. If the Bidder's intent, as determined by the Exchange, is clearly established based on review of the complete Final Offer submittal, the Exchange may at its sole option correct an error based on that established intent.

2. The Exchange may at its sole option correct obvious clerical errors.

3. The Exchange may at its sole option correct discrepancy/errors on the basis that if intent is not clearly established by the complete Final Offer submittal, the Master Copy shall have priority over additional copies.

4. 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.

5. A bidder may withdraw its bid by submitting a written withdrawal request to the Exchange, 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.

6. The Exchange may modify the RFO prior to the date fixed for submission of bids by the issuance of an addendum to all parties.

7. The Exchange reserves the right to reject any/all bids. The Exchange is not required to award an agreement.

8. Before submitting a response to this solicitation, bidders should review, correct all errors, and confirm compliance with the RFO requirements.

9. No oral understanding or agreement shall be binding on either party.

1.9 Protest

A protest may be submitted according to the procedures set forth below. If a vendor has submitted an offer which it believes to be totally responsive to the requirements of the solicitation process and believes the offerer should have been selected, according to Section 6.3 - Evaluation Criteria, and the offerer believes the Exchange has incorrectly selected another offerer for the award, the offerer may submit a protest of the selection as described below. Protests regarding selection of the “successful offerer” will be heard and resolved by the California Health Benefit Exchange’s Executive Director.

All protests must be made in writing, signed by an individual who is authorized to contractually bind the offerer, 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 business days after vendor selection. Protests must be mailed or delivered to:

Mailing Address:
California Health Benefit Exchange
Attn: Peter V. Lee, Executive Director
560 J Street, Suite 290
Sacramento, CA 95814

1.10 Disposition of Bids

Upon bid opening, all documents submitted in response to this RFO will become the property of the State of California, and subject to Government Code 100508, at the Exchange's sole discretion, may be regarded as public records under the California Public Records Act (Government Code Section 6250 et seq.) and subject to review by the public.

1.11 Agreement Execution and Performance

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

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

2. MINIMUM & DESIRABLE QUALIFICATIONS

2.1 Respondent's Minimum Qualifications

The Bidders identified in the response to this RFO must have knowledge in the following areas:

1. **Training Programs:**
   A. Knowledge of the California Health Benefit Exchange (Covered CA) and the Affordable Care Act.
   B. Proven success in developing, implementing and delivering effective Training Programs, specifically in the area of health care programs for a service center environment. Bidders must have:
      1) A minimum of 7-10 years experience in developing training curriculum, content, modules and materials.

2) A minimum of 7-10 years experience in facilitating and delivering Instructor-Lead Training programs (e.g., in-person classroom presentations and training).
3) A minimum of 7-10 years experience in developing computer-based training programs.
4) A minimum 7-10 years experience in developing comprehensive training programs, which includes contents comprising of work flow functions, policies and procedures, consumer relation management, customer service support.
5) A minimum 7-10 years experience in developing comprehensive "Train-the-Trainer" programs and delivering such programs in an Instructor-Led manner.
6) A minimum of 7-10 years experience in developing training content, materials and delivery in easily understood and user-friendly manners to training audience.

C. A minimum of 7-10 years experience in continuous improvement to further refine training programs. This includes recommendations and modifications to training content, materials and modules based on program evaluations and measurements.

2. Readability, Translation and Focus Group Testing of Written Program Materials:

A. Knowledge of the California Health Benefit Exchange (Covered CA) and the Affordable Care Act.

B. A minimum of 7-10 years experience in providing readability services of written materials (at a reduced reading grade level) and written translation services specifically in the area of health care programs. Written translation experience includes the ability to produce materials in culturally and linguistic appropriate manners, particularly in Spanish, a variety of Asian languages, and other different languages (e.g., Farsi, Armenian, Russian, Arabic, etc.), as requested by Covered California.

C. A minimum of 7-10 years experience in conducting focus group testing to ensure that written materials are developed in a manner that is consumer-friendly and consumer focused, specifically in the area of health care programs. This experience includes conducting focus group testing in English, Spanish, and a variety of Asian languages.

3. Meet requirements outlined in the Scope of Work.

4. Demonstrate capacity to perform the services and work outlined in the Scope of Work with an aggressive timeline in providing contracted work products and deliverables.

2.2 Respondent's Desirable Qualifications

1. Knowledge and experience with prior projects successful in developing successful training programs for public health care programs, including Medicaid, Children's Health Insurance Program, or other state Exchanges.

2. Knowledge and experience with prior projects successful in providing readability and written translation services (in culturally and linguistic appropriate manners) for public

health care programs, including Medicaid, Children's Health Insurance Program, or other state Exchanges.

3. Knowledge and experience with prior projects in providing focus group testing for public health care programs, including Medicaid, Children's health Insurance Program, or other state Exchanges.

4. Knowledge and experience with prior projects, as described in Section 2.1 of this RFO, with the implementation of training programs, readability services, written translation services, and focus group testing performed in California.

2.3 Reassignment of Personnel

1. The Contractor shall not reassign personnel assigned to the Agreement during the term of the Agreement without prior written approval of the Exchange. 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.

   The Exchange and the Contractor shall negotiate the cost of each deliverable. The deliverable shall be dependent, in part, upon the experience and individual skills of the proposed substitute personnel. The negotiated rate cannot exceed the maximum cost stated in the Agreement.

2.4 Requirement to File a Statement of Economic Interests

1. In accordance with Title 2, California Code of Regulations, Section 18701, the Contractor is required to complete a Statement of Economic Interests (Form 700) on an annual basis http://www.fppc.ca.gov/index.php?id=500

2. Contractor's Contract Manager and any professional-level employees and/or subcontractors engaged in performing the consulting tasks described in this Agreement shall complete and submit a Form 700 to the Exchange Contract Manager.

3. On an annual basis during the term of this Agreement, the Contractor and the same individual and any new professional-level personnel or subcontractor must complete and return a new Form 700. All subsequent forms must be received before the expiration of the initial Form 700. Noncompliance shall be cause for termination of this Agreement.

3. SCOPE OF WORK (SOW)

3.1 Statement of Purpose

The purpose of this Request for Offer (RFO) is to obtain the services of a contractor who can work with Covered California to scope, develop, and deliver a comprehensive training program that leverages multiple sources of content into cohesive training packages for use throughout the needs of Covered California. These services will enable the delivery of a coordinated and integrated Training Program for Covered California's Service Centers and external partners (e.g., county eligibility workers, plan enrollers, etc.). In addition, the services will also include readability services, focus group testing, and written translations written services (in culturally and linguistic appropriate manners) for Covered California program materials. The scope of work includes, but is not limited to:

1. Providing a training approach designed from deep understanding in areas specific to health care knowledge and expertise that enables consistency across multiple service centers, external partners, and communication channels.
2. Assist Covered California with the development of its Service Center knowledge-based content information to ensure representatives are experts and have access to crucial information to help them provide first-class consumer service. This includes assisting Covered California with the development of Service Center workflows, procedures, job aids, call center scripts, etc., which will be used for the development and delivery of the Training Program.
3. Improve the ability of Service Center Staff to exceed the expectations of Covered California customer's needs and concerns.
4. Improve the ability of Covered California's external partners (e.g., county eligibility workers, Healthy Kids Program partners, and plan enrollers, etc.) to exceed the expectations of Covered California customer's needs and concerns.
5. Develop training content, materials, modules and deliver the training program (e.g., Instructor-Led Training and Computer Based Training) in easily understood and user-friendly manners to a variety of Covered California's training audiences.
6. Development of a Training Program that shall consist of Instructor-Led Training (ILT), Computer Based Training (CBT), and Train-the-Trainer Program for a variety of audiences (e.g., Service Center staff and external partners).
7. Provide readability services of Covered California program written materials (at a reduced reading grade level).
8. Provide written translation services (in culturally and linguistic appropriate manners) in a variety of threshold languages, which include Spanish, a variety of different Asian languages and other languages for program materials, specifically in the area of health care programs.
9. Conduct focus group testing to ensure that written materials are developed in a manner that is consumer-friendly and consumer focused, specifically in the area of health care programs.

3.2 Background

Covered California identified a need for training services to assist the organization to create, develop, implement and deliver training to a variety of audiences, as noted in Section 3.4 of this Request for Offer. The Training Program will be developed in a manner that facilitates the delivery of Instructor-Led and Train-the-Trainer programs.

Covered California also contracts with other vendors to develop other types of training programs, specifically for the Assisters Program and Information Technology Training Program. The curriculum and models for these training programs are currently under development and are being designed. For example, curriculum and models are currently being created and designed for the following subject matters and topics include but are not limited to:

- Affordable Care Act Overview
- Covered California and Medi-Cal Overview;
- Covered California eligibility and enrollment requirements;
- Modified Adjusted Gross Income (MAGI) Medi-Cal eligibility and enrollment requirements;
- Plan options for Covered California and MAGI Medi-Cal;
- Consumer Assistance Programs;
- Handling Protected Health Information (PHI); and
- California Healthcare Eligibility, Enrollment & Retention System (CalHEERS).

For more information about the Assisters Program training topics, please click here.

The RFO vendor will be expected to leverage and reuse (when appropriate) the training materials that are currently being developed for the Assisters Program (2-3 day training curriculum) and Information Training Program. The RFO vendor will then further refine and expand upon these training materials when developing other Training Programs as set forth in this RFO. This will ensure that the training services provided under the agreement meets the needs of Covered California. Further refinements and modifications to materials developed by other vendors will be necessary, in order to successfully train Covered California's Service Center staff and external partners to efficiently and perform their roles, responsibilities and functions. Training audiences must be knowledgeable to provide first class customer service in a consumer-focused manner.

Although training content and modules are being provided by various vendors, it is crucial that the development and delivery of training is presented in a seamless manner. It will be the responsibility of the RFO vendor to ensure the consistency of the training program's visual presentation (e.g. "look and feel") and delivery (e.g., tone) occurs for the Training Programs being developed and delivered by the RFO vendor.

Based on a preliminary training needs analysis, Covered California assumes the following noted below. However, the length of training may change based on the RFO vendor's additional training needs analysis:

- Service Center staff training will be approximately a 6 week course.
- County eligibility worker training will be approximately a 1-2 week course (at most).*****
- Healthy Kids Program partner training will be a 3-4 day course.*****
- Plan enrollment training will be a 3-4 day course.*****

***** Note: The work that is developed for the Service Center staff training will be used to develop these other training programs. It may be the case that these training programs will be excerpts of the Service Center training, once the needs of these audiences are fully defined.

3.3 Reference Documents

For additional information about the California Health Benefit Exchange and previous solicitations, please visit: http://www.healthexchange.ca.gov/Pages/Default.aspx

3.4 Project Tasks

1. **Overview:** The Contractor shall design, develop, test, deliver and package a training program for the California Health Benefit Exchange Staff that incorporates the policies & procedures from Covered California, systems training developed by the Covered California technology partner and Contractor developed skills materials pertinent for each of the following groups:

    - Service Center Staff (Covered California). This includes Instructor-Led and Train-the-Trainer Programs:
        - Three (3) Service Center Sites located in:
            - ✓ Sacramento County (Site 1)
            - ✓ To-Be-Determined (Site 2)
            - ✓ Contra Costa County (Site 3)
    - Service Center County Staff - Site 3 (Train-the-Trainer Program)
    - External County Eligibility Work Force (Train-the-Trainer program)
    - External Plan Enrollers
    - External Healthy Kids Program partners
    - Other external partners as required by Covered California

    All staff shall be required to complete the staff training program prior to performing the duties of their position. Staff must be sufficiently trained on the job functions necessary to support providing Covered California products and services to consumers.

    <u>Training Type:</u>

The Staff Training Program developed by the Contractor shall consist of Instructor-Led Training (ILT) and Computer Based Training (CBT). At a minimum, the Staff Training Program shall include the following training types per staff group:

Training Audience	*Estimated Number of Individuals	ILT	CBT
Service Center Staff - includes all 3 Service Center Site (Instructor Led and Train-the-Trainer Program)	850	X	X
County Eligibility Workers (Train-the-Trainer Program)	TBD	X	X
Plan Enrollers (Train-the-Trainer Program)	TBD	X	X
Other internal or external partners	TBD	X	X

**Estimated # subject to change*

Optional service if requested by the Exchange: If requested and directed by the Exchange, the RFO vendor will assist Covered California to develop training content and materials for Covered California Headquarter Staff. If this additional service is needed, the services and deliverables will be executed through a formal contract amendment. Costs for deliverables will be further negotiated.

- Financial Management Staff (Covered California Headquarter Staff)
- Eligibility and Enrollment Staff (Covered California Headquarter Staff)
- Policy Staff (Covered California Headquarter Staff)
- Consumer Assistance Staff (Covered California Headquarter Staff)
- Small Business Health Options Program (SHOP) Staff (Covered California Headquarter Staff)
- Health Plan Management Staff (Covered California Headquarter Staff)

Training Collaboration

The Contractor shall collaborate and coordinate with all Covered California program staff, Department of Health Care services, and vendors to ensure that all training audiences are provided a comprehensive training program.

A. Project Management: The Contractor shall perform Project Management activities to ensure the successful completion of the Training Programs. The Project Management activities shall include, but not be limited to, the following:

1) Project Management Plan: The Contractor shall develop a Project Management Plan that identifies the Contractor's plan for managing communication, changes, staff, risks, and issues throughout the project.

2) Detailed Work Plan: The Contractor shall develop a detailed work plan using Microsoft Project 2010 or newer that identifies all activities and tasks associated with the Training Programs. The detailed work plan must be submitted to the Covered California each week with updates including % complete. At a minimum, the detailed work plan shall include the following:

a) Task / Deliverable
b) % Complete
c) Start Date
d) End Date
e) Milestones
f) Owner
g) Other information required by Covered California

3) Detailed Budget: The Contractor shall develop a detailed budget that outlines all costs associated with the Training Programs.

4) Status Meetings: The Contractor shall attend weekly status meetings including various meeting with the Covered California Training Team, other vendors and program staff.

5) Status Reports: The Contractor shall develop monthly status reports no later than the 5^{th} business day of each month. At a minimum, the status report shall include the following:

   a) Activities performed during the reporting period
   b) Activities that will be performed during the upcoming reporting period
   c) Milestone Status Review
   d) Outstanding Issues / Risks
   e) Other information required by Covered California

6) Deliverable Expectation Documents (DEDs): The Contractor shall develop and submit Deliverable Expectation Documents (DEDs) for all Deliverables associated with this project. The Contractor must receive approval from the Covered California on DED's, prior to submission of the deliverable associated with that DED. The DED shall contain information required by Covered California.

B. Training Design: The Contractor shall design various Training Programs for the Covered California. The design activities shall include, but not be limited to, the following design activities:

1) Training Needs Analysis: The Contractor shall perform a needs analysis to identify the training needs of each Covered California training audience. A specific needs analysis for training audience is necessary to help gauge and shape acceptable development and delivery timelines.

2) Training Plan: The scope of work for the Contractor will include the scoping, development and delivery of a comprehensive training program that leverages multiple sources of content into cohesive training packages for use throughout the Covered California organization. Training areas specific to health care, written language translation, written and spoken readability, and content development. The Staff Training Program developed by the Contractor shall consist of Instructor-Led Training (ILT) and Computer Based Training (CBT). The Contractor shall collaborate with Covered California's Training Team, program

staff, Department of Health Care Services and other vendors to ensure that all training audiences have and receive a comprehensive training program.

a) The Contractor shall develop a Training Plan that identifies the approaches, activities and milestones to train each training audience. At a minimum, the Training Plan shall and shall address the following:

(1) Affordable Care Act overview;
(2) California Affordable Care Act overview;
(3) Covered California overview;
(4) Modified Adjusted Gross Income (MAGI) Medi-Cal overview;
(5) Coordination activities with Covered California, Department of Health Care services, and counties
(6) Eligibility requirements for Covered California and MAGI Medi-Cal programs:
(7) Covered California's post enrollment and case management functions;
(8) Covered California's qualified health plan options;
(9) Covered California's tax credits and cost sharing reductions and non-subsidized programs;
(10) Proper handling of financial and tax information;
(11) Scope and benefits of Covered California products for subsidies and non-subsidies;
(12) Cultural and linguistic standards required by Covered California and Department of Health Care Services;
(13) Access standards for individuals with disabilities;
(14) Health Insurance Portability and Accountability Act (HIPPA)
(15) Privacy and security standards established by Covered California, Department of Health Care Services, the State of California, and federal government;
(16) Referrals to Consumer Assistance Programs;
(17) California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS)***;**
(18) Customer Relations Management System (CRM)*****;
(19) Other training topics required by Covered California or Department of Health Care Services.

b) Implementation Training – Initial training users will receive prior to starting work
c) Refresher Training – Training for those users that have received initial training, have started their work, and have been identified as needing additional training
d) Onboarding Training – Training for new staff that arrive in the future after Implementation training
e) Train-the-Trainer – Training for staff members that will be responsible for training other staff members in the future
f) Identify approaches related to the performance of project and training management and oversight activities.

* Note: The CalHEERS and CRM information technology (IT) system training program (e.g., training curriculum and modules) will be fully developed by another vendor. It will be the responsibility of the RFO vendor to fully integrate

the IT system training programs into the curriculum and training materials being developed under this agreement.

C. Training Development: The Contractor shall develop all training materials and artifacts that will be used to deliver the Training Programs. The Contractor shall develop all training materials and artifacts in a manner in which training materials and artifacts will be used for a variety of internal and external Covered California training audience. All training materials and artifacts shall be developed in coordination and alignment with the training materials and artifacts developed by other vendors. Any materials developed by the Contractor are owned by Covered California and can be modified and adapted for future use upon delivery.

The training materials and artifacts shall be developed to follow Section 508 standards of the Rehabilitation Act of 1973 (29 U.S.C. 794d). All public-facing portals shall support the latest (generally available) versions of popular web-browsers including, but not limited to,: Internet Explorer 8, Firefox 4, Safari and Chrome. Users shall be able to access training materials and artifacts over mobile devices and tablets. All training materials and artifacts shall be stored, integrated and launched through the Covered California Learning Management System (LMS). The LMS will be provided by another vendor. Training Development shall include, but not be limited to, the following development activities:

1) Course Outline: The Contractor shall develop a course outline using the Training Needs Analysis results. The course outline will be used by the California Health Benefit Exchange to develop a “menu” of total training course offerings. At a minimum the course outline shall include the following:

   a) Course Name
   b) Learning Objectives
   c) Intended Audience
   d) Module Name
   e) Allotted time to train the module
   f) Estimated CBT hours of the module
   g) Estimated ILT hours of the module
   h) Other information required by Covered California and the Department of Health Care Services

2) Course Curriculum: The Contractor shall develop curriculum for all training courses/modules. This shall include the development of User Curriculum and Train-the-Trainer Curriculum for each Covered California training audience. The curriculum shall address, but not be limited to, the following:

   a) Operational Procedures
   b) Customer Service support, including call center scripts, workflows, procedures and policies, etc.
   c) Sharable Content Object Reference Model (SCORM) compliance
   d) Case/Client Management
   e) Eligibility Criteria for Covered California and MAGI Medi-Cal programs
   f) Enrollment into Covered California and MAGI Medi-Cal programs
   g) Payments
   h) Reporting

- i) Appeals, complaints, and adjudications, including informal resolutions
- j) County coordination activities for with the Medi-Cal programs
- k) Plan technical support
- l) Security and confidentially requires (including handling of Protected Health Information)
- m) Quality control, quality assurance and quality improvement
- n) Readability - A readability assessment must be performed on all training curriculum and modules to ensure that training is presented in a user friendly manner and is easily understood by the training audience
- o) Other course curriculums identified by Covered California and the Department of Health Care Services

3) Course Schedule: The Contractor shall develop and publish a Course Schedule that outlines the schedule of training delivery for all staff training user groups.

4) Learning Management System Integration (LMS): The Contractor shall integrate all training materials and artifacts into the California Health Benefit Exchange LMS.

5) Training Materials: The Contractor shall develop all training materials to be used for the Staff Training Program. At a minimum, training materials shall include, but not be limited to the following:

   - a) Job Aids - The Contractor shall develop job aids for all courses for both End-User Training and Train-the-Trainer Training. This includes assisting Covered California in the development of call center scripts, work instructions, and documenting policies and procedures.
   - b) Initial Training Evaluations - The Contractor shall develop course evaluations for each training audience group.
   - c) Student Guide - The Contractor shall develop a User Guide for each training audience group.
   - d) Instructors Guide - The Contractor shall develop an Instructors Guide for each training audience group.
   - e) Instructor-Led Training (ILT) Presentation - The Contractor shall develop an ILT presentation for all training group requiring ILT Training.
   - f) Computer Based Training (CBT) - The Contractor shall develop CBT modules for each training audience group. CBT courses must be authored in Adobe Creative Suite – Captivate.
   - g) Course Exams - The Contractor shall develop Course Exams at the end of each training course.
   - h) Comprehensive Training Exam - The Contractor shall develop a Comprehensive Training Exam that tests the knowledge of each training audience group at the conclusion of their training.
   - i) All training materials must meet translation and readability guidelines established in the training plan.

6) Coordination with DHCS: The Contractor shall coordinate and collaborate with the Department of Health Care Services to develop training curriculum, content, materials, modules and artifacts directly related to DHCS programs and services. The training materials and artifacts will be used by a variety of users, including

Covered California Service Centers, county eligibility workers, plan enrollers and Healthy Kids Program partners, etc.

7) Coordination with Other Covered California Training Vendors: The Contractor shall coordinate and collaborate with other vendors when developing training curriculum, content, materials, modules and artifacts directly related to program and IT training. This will ensure that the Training Programs being developed and provided by the RFO vendor leverages (and reuses when appropriate) the work that is being provided by other training vendors. In addition, this coordination and collaboration is necessary in order to prevent the duplication of work being provided by the RFO vendor and other Covered California vendors.

D. Training Delivery

1) Training Materials: The Contractor shall submit to the State for review and approval, all training materials before implementation. The State shall have final approval on all program materials.

2) Service Center Staff Training: The Contractor shall deliver a comprehensive training program designed specifically for approximately 850+ Service Center Staff. The Contractor will deliver, facilitate and conduct the training in an instructor led manner for the Train-the-Trainer Program to the Service Center trainer staff.

   In addition, the Contractor will be required to facilitate Instructor-Led training to Service Center Staff in order to properly train all Service Center staff once they are hired. This is necessary due to Covered California's aggressive and quick timeline in hiring staff who will be employed to support the Service Center functions.

   Once all Service Center staff (including Service Center trainers) are trained, the Contractor shall develop a comprehensive report that summarizes Initial Training Evaluation results.

3) County Staff Training (Train-the-Trainer Program): The Contractor shall deliver a comprehensive training program designed specifically for the county eligibility worker training staff (utilizing Train-the-Trainer concept). The Contractor will deliver, facilitate and conduct the training in an instructor led manner for the Train-the-Trainer Program to county eligibility worker training staff. Once county eligibility trainers are trained, the Contractor shall develop a comprehensive report that summarizes Initial Training Evaluation results.

4) Plan Enroller Staff Training (Train-the-Trainer Program): The Contractor shall deliver a comprehensive training program designed specifically for the plan enroller staff (utilizing Train-the-Trainer concept). The plan enroller staff are employees of the Covered California qualified plans. The Contractor will deliver, facilitate and conduct the training in an instructor led manner for the Train-the-Trainer Program to plan enroller training staff. Once plan enroller staff trainers are trained, the Contractor shall develop a comprehensive report that summarizes Initial Training Evaluation results.

5) Healthy Kids Program Partners (Train-the-Trainer Program): The Contractor shall deliver a comprehensive training program designed specifically to train the Healthy Kids Program partner staff (utilizing Train-the-Trainer concept). The Contractor will deliver, facilitate and conduct the training in an instructor led manner for the Train-the-Trainer Program to Healthy Kids Program training staff. Once Healthy Kids Program trainers are trained, the Contractor shall develop a comprehensive report that summarizes Initial Training Evaluation results.

6) Other Training Delivery: The Contractor shall deliver training programs as required by Covered California.

E. Training Maintenance & Evaluation

1) Course Evaluations: The Contractor shall distribute, collect, analyze and report on course evaluations for each user group. At a minimum, the course evaluations shall include:

   a) Critical Business Knowledge Evaluation – The Contractor will develop module specific evaluations to measure the effectiveness of users learning and application of knowledge within a training module. Areas of critical business knowledge shall be provided at the direction of the Exchange. Examples of evaluation types may include, but not limited to, CBT evaluation of staff selecting correcting information for determining enrollment, multiple choice evaluations, and scenario-based application of business knowledge in determining the correct process to follow based on instruction.

   b) Weekly Training Evaluations – The Initial Training Course Evaluation shall be given at the conclusion of each training course (weekly). The Initial Training Evaluations shall assess the level of comfort users have with the course material and the overall perception of the effectiveness of the training. The Initial Training Course Evaluation shall assess each functional core area by training audience group and shall include any information required by Covered California. The Contractor shall develop a comprehensive Weekly Training Evaluation Report at the conclusion of training week for each user group within the LMS.

   c) Post-Training Evaluations – A Post Training Course Evaluation shall be given at the conclusion of the assigned training period for all training audience groups. The Post-Training Evaluation shall assess the level of comfort users have with performing their job functions and the overall perception of the effectiveness of the training. The Post Training Course Evaluation shall assess each functional core area by training audience group and shall include any information required by Covered California. The Contractor shall develop a Post-Training Evaluation Report that summarizes the results of all Post-Training Evaluations for each training audience group.

   d) Final Training Evaluation Report – The Final Training Evaluation Report will be provided by the Contractor. The Contractor shall develop a comprehensive final report that identifies the effectiveness of the Training

Program for each training audience group. The Final Training Evaluation Report shall, at a minimum, identify the following information:

(1) Areas of the Training Program which requires further refinements and improvements that need to be considered by Covered California and the Department of Health Care Services. This includes the Contractor providing recommendations and options to be considered. The Contractor shall explain the feasibility and viability of each recommended option, which includes pros and cons for each option.
(2) Areas of the Training Program that were successful (e.g., curriculum, training content, materials, delivery, etc.). This will be substantiated with data, statistics, outcomes of the trainee exams, observations made by the Contractor in the classroom environment, etc.
(3) Lessons learned and best practices for each Training Program. This includes delivery techniques and other necessary information to be considered by Covered California and the Department of Health Care Services.
(4) Other information as required by Covered California.

e) Other evaluations as required by Covered California.

2) Corrective and Refresher Training: The Contractor shall develop and provide additional training as required by Covered California. In the event training modules, materials or curriculum need to be further revised to successfully train and ensure the knowledge base of the training audience group are properly retained, the Contractor shall make modifications to the Training Program in order to maximize the training audience group's understanding of program requirements and training audience's experience.

For example, the Contractor shall develop corrective and refresher training in program areas in which there are gaps in the training program. Gaps include, but are not limited to, the Training Program not containing (or lacking) important information, content and materials needed to help the audience group successfully perform their roles and responsibilities in providing first class customer service. This also includes the Contractor providing additional Instructor-Led Training or Computer-Based Training, as required by the Covered California and the Department of Health Care Services.

F. Learning Management System: The Contractor shall also be able to develop training materials which are in alignment with and integrate into the Covered California Learning Management System (LMS) / Learning Content Management System (LCMS). The LMS/LCMS will shall be used to support training for all Covered California audience groups. The LMS/LCSM will be provided by another vendor. At a minimum, the LMS/LCMS provided system will provide the following functionalities:

1) Support Web-Based Training (including Computer Based Training, Webinar, etc.) registration, delivery and tracking (including bookmarking) for all California Health Benefit Exchange Training Courses
2) Support Instructor-Led Training registration and tracking (including bookmarking) for all California Health Benefit Exchange Training Courses

3) Web-Based Training and test authoring capability
4) Online testing/certification and accreditation
5) Online course/instructor evaluation
6) Online collaboration and communication
7) Multiple user classes
8) Waitlists
9) Full printable transcripts
10) Printable certifications and records of completion
11) Comprehensive reporting for training management
12) Storage and management of all training materials including but not limited to Job Aids (PDF), Instructor Manuals (PDF), User Manuals (PDF), Instructor-Led Presentations (PDF or PowerPoint), and all Adobe Captivate CBT Modules.
13) Course reminders/notifications
14) Multiple languages
15) Additional functionality at the discretion of the California Health Benefit Exchange

G. Readability, focus group testing, and translation services for program materials

The Contractor shall conduct readability, focus group testing and translation services for program materials. Services include, but are not limited to, the following:

1) Conduct readability of program materials to ensure that materials are developed and presented in a manner that is easily understood by consumers and the general public, with a low reading grade level (e.g., 6th or 9th grade). Program materials include, but are not limited to, the following:
   a) All outgoing correspondence, notices and letters, forms and other program materials developed for the public;
   b) If directed by Covered California, information presented on Coveredca.com consumer website and the CalHEERS website;
   c) Outreach & Education collateral materials, which may include brochures, tri-folds, tip cards, posters, etc.
2) Ensure that program materials are translated into multiple languages and are developed in culturally and linguistic appropriate manners. Written translations will be produced in Spanish, Chinese, Vietnamese, Korean, Tagalog, Hmong, Russian, Farsi, and other threshold Medi-Cal languages;
3) Conduct focus group (community review to the Assisters Program population and Covered California's targeted populations) and/or field testing in a variety of languages to ensure that program materials and collateral materials are developed in a manner that meets the needs of California's diverse population. Focus group testing will be conducted in English, Spanish, various Asian languages and other languages as directed by Covered California. Focus group testing will be conducted in northern, central and southern California; and

4) Provide and perform project management and oversight activities for the services identified in this Section of the RFO.

2. **Costs and Due Dates for Deliverables & Exchange Oversight:** In order to ensure that the Contractor successfully provides services and deliverables under this Agreement, the California Health Benefit Exchange staff shall closely monitor and provide continuous oversight on the Contractor's performance. Daily engagement with Exchange training management and regular weekly project meetings shall occur. Upon the review, approval, and acceptance of deliverables from the California Health Benefit Exchange, the Contractor shall be paid the following amount noted below in arrears. Under no circumstances will payments be issued to the Contractor until Exchange staff thoroughly reviews all invoices and deliverables have been accepted by the California Health Benefit Exchange.

3. The California Health Benefit Exchange Service Center training program must be fully operational by May 2013, in preparation for going live with enrollments on October 1, 2013.

Summary Description of Task: (Details Contained in Prior Sections of the Statement of Work)	**Deliverable**	**Expected Deliverable Due Dates:***
Project Management	Project Management	
	Project Management Plan	Late-April 2013
	Detailed Work Plan	Late-April 2013
Training Design	Training Design	
	Needs Analysis Report	Early-May 2013
	Training Plan	Mid-May 2013
Training Development	Course Curriculum	
	Service Center Staff	*Early-May 2013*
	County Eligibility Workers	*Early-May 2013*
	Plan Enrollers	*Early/Mid-May 2013*
	Healthy Kids Program Partners	*Early/Mid-May 2013*
	Training Materials	
	Service Center Staff	*Late-May – August2013*
	County Eligibility Workers	*Late-May – August 2013*
	Plan Enrollers	*Mid-June – August 2013*
	Healthy Kids Program Partners	*Mid-June – August 2013*
Training Delivery	Training and Initial Training Evaluation Report	
	Service Center Staff	*June 2013 and ongoing*
	County Eligibility Workers	*June/July 2013 and ongoing*
	Plan Enrollers	*July/August and ongoing*
	Healthy Kids Program Partners	*July/ August 2013 and ongoing*
Training Maintenance		

Summary Description of Task: (Details Contained in Prior Sections of the Statement of Work)	Deliverable	Expected Deliverable Due Dates:*
	Post Training Evaluation Report	
	Service Center Staff	*Quarter 4 2013*
	County Eligibility Workers	*Late-May – August 2013*
	Plan Enrollers	*Mid-June – August 2013*
	Healthy Kids Program Partners	*Mid-June – August 2013*
	Corrective and Refresher Training	
	Corrective and Refresher Training	*TBD*
	Final Evaluation Report	*May 2014*
Readability of Program Materials (Letters and Forms)	• *Blank Application Form* • *Notice of Inconsistencies/Incompatibilities* • *Notice of Missing Information* • *APTC/CSR NOAs – (approx. 10)* • *QHP (unsubsidized) NOAs (approx.. 5)* • *Plan Information (approx.. 5)* • *Disenrollment/Termination (approx. 2)* • *Other (missing information and reminder notices, approx.. 5)*	*May - June 2013*
	• *Appeals/Exemptions (approx. 4.)* • *Payments (approx.. 5)*	*July - August 2013*
	• *Annual Re-determination (approx. 3.)* • *Referrals (approx. 2)*	*August - September 2013*
Translation of Program Materials (Letters and Forms)	• *Blank Application Form* • *Notice of Inconsistencies/Incompatibilities -* • *Notice of Missing Information* • *APTC/CSR NOAs – (approx. 10)* • *QHP (unsubsidized) NOAs (approx.. 5)* • *Plan Information (approx.. 5)* • *Disenrollment/Termination (approx. 2)* • *Other (missing information*	*May - June 2013*

Summary Description of Task: (Details Contained in Prior Sections of the Statement of Work)	**Deliverable**	**Expected Deliverable Due Dates:***
	and reminder notices approx. 5)	
	• *Appeals/Exemptions (approx. 4.)* • *Payments (approx. 5)*	*July - August 2013*
	• *Annual Re-determination (approx. 3.)* • *Referrals (approx. 2)*	*August - September 2013*
Focus Group Testing (Letters and Forms)	• *Blank Application Form* • *Notice of Inconsistencies /Incompatibilities* • *Notice of Missing Information* • *APTC/CSR NOAs – (approx. 10)* • *QHP (unsubsidized) NOAs (approx.. 5)* • *Plan Information (approx.. 5)* • *Disenrollment/Termination (approx. 2)* • *Other (missing information and reminder notices, approx. 5)*	*May - June 2013*
	• *Appeals/Exemptions (approx. 4.)* • *Payments (approx.. 5)*	*July - August 2013*
	• *Annual Re-determination (approx. 3.)* • *Referrals (approx. 2)*	*August - September 2013*

3.5 Contract Completion Criteria

This contract will be considered complete when the Exchange Project Manager has approved and accepted all assigned deliverables.

3.6 Deliverable Acceptance Criteria

All concluded work must be submitted to the Exchange for review and approval or rejection. Payment for all tasks performed under this SOW will be by deliverable. It will be the Exchange’s sole determination as to whether a deliverable has been successfully completed and is acceptable.

Throughout the contract, the Exchange will review and validate deliverables prior to final acceptance. In addition, the Exchange’s Project Manager will verify and approve the Contractor’s deliverable invoices. Signed acceptance is required from the Exchange Project Manager to approve an invoice for payment.

Deliverable acceptance criteria consist of the following:

1. Deliverable-specific work was completed as specified and the final deliverable product/service was rendered.
2. Plans, schedules, designs, documentation, and reports 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 the Exchange.
5. If a deliverable is not accepted, the Exchange will provide the reason, in writing, within ten business days of receipt of the deliverable.

3.7 Contractor Minimum Requirements

3.7.1 Contractor Qualifications

Contractors must demonstrate the minimum qualifications included in Section 2.1 of this solicitation.

3.7.2 Team Qualifications

Contractor must demonstrate that staff assigned to this project will possess the experience, education, knowledge, and skills required to perform the scope of work described in this RFO. At least one member of the proposed Team must possess the following experience:

1. Minimum 5-7 years of experience providing training in a classroom setting.
2. Minimum 5-7 years of experience in managing multi-site, multi-training program & delivery.
3. Minimum 5-7 years experience providing readability, written translation services and conducting focus group testing.
4. Minimum 6-8 years management expertise, including program management, account management with ability to help provide strategy & direction.

3.8 Contractor Roles and Responsibilities

The Contractor is expected to:

1. Designate a person to whom all project communications may be addressed and who has the authority to act on all aspects of this contract. 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 the Exchange and formally respond to the Exchange review findings as necessary.

3. The Contractor will 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 the Exchange's Project Manager. Failure to receive the required approvals may result in termination of the contract.

3.9 The Exchange's Roles and Responsibilities

The Exchange will:

1. Designate the Exchange 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 agreement 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 RFO.

3. Ensure appropriate resources are available to perform assigned tasks, attend meetings, and answer questions.

4. Ensure that decisions are made in a timely manner.

5. Provide work areas and meeting rooms as needed, including a desk and chair, internet connection, and access to printer, copier, and fax services.

6. Identify and provide access to Subject Matter Experts to assist with the elaboration of technical requirements, including any stakeholder groups providing input on health plan management and benefit plan design issues.

3.10 Project Assumptions and Constraints

1. The Contractor must be available for training the Exchange's key staff on-site or where directed by the state during The Exchange's Service Center business hours of 8:00 AM to 5:00 PM PST, Monday through Friday.

2. No overtime pay will be authorized for non-standard work hours.

3. Any modifications to tasks within the SOW of this contract will be defined, documented, and mutually agreed upon by the Contractor and the Exchange’s Project Manager prior to starting work on the modified task. Any such modifications may require an amendment to this contract. Amendments to the contract for tasks within the SOW are limited to an extension of time or tasks directly related this SOW.

4. The Exchange’s Project Manager reserves the right to renegotiate the services deemed necessary to meet the needs of this project according to the Exchange’s priorities. The Exchange 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.

5. The training will be held at several locations within the greater Sacramento area and Central Valley.

6. The Exchange 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 the Exchange’s Project Manager and the Contractor’s engagement manager, respectively, within 48 hours of becoming aware of the problem.

3.11 Contract Engagement Period

The term of this contract is April 12, 2013 through June 30, 2014. An amendment will be required to extend the end date of this contract.

3.12 Travel

The Exchange will reimburse the Contractor at the rates established by the California Department of Human Resources for its represented employees. For current rates and travel policies, visit their website at http://www.calhr.ca.gov/employees/Pages/travel-reimbursements.aspx. Contractor travel deemed necessary for the project must be approved in advance by the Project Manager.

The cost of any travel must be included in the hourly rates specified in the Cost Worksheet submitted with the Contractor’s Offer.

3.13 Payment and Invoicing

Payment to the Contractor is contingent upon the State having sufficient funds to reimburse the Contractor for costs incurred under this contract. The Exchange shall bear no liability or responsibility for payment to Contractor, even for services provided and delivered, in the event funding is delayed, suspended, or terminated.

Payment to the Contractor will be contingent upon final approval of each deliverable. This is a deliverable-based, agreement. The hours projected for each identified deliverable will be used to assess the reasonableness of the Contractor's Offer. The Contractor may invoice the Exchange only after the successful completion and acceptance of the deliverable.

4. REQUEST FOR OFFER (RFO) RESPONSE CONTENT

Issuance of this RFO in no way constitutes a commitment by the State of California to award an agreement. The Exchange reserves the right to reject any or all offers received if the Exchange determines that it is in the Exchange's best interest to do so. The Exchange may reject any offer that is conditional or incomplete. Assumptions made by the Bidder in responding to this RFO do not obligate the Exchange in any way. Additionally, assumptions may make the offer conditional and be cause for the offer to be rejected. Responses to this RFO will be assessed based on determining the "Best Value" and the selection, if made, will be to a single Bidder. The SOW and the Offer will be made a part of the resulting Agreement.

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

1. Administrative Requirements
2. Understanding and Approach
3. Resumes
4. Work Sample
5. References
6. Costs
7. Contractor Qualifications
8. Team Qualifications
9. Project Management and Approach
10. Understanding and Description of the Tasks to be Performed (Work Plan)

4.1 Proprietary Information

Any documentation submitted which has been marked "Confidential" or "Proprietary" may not be accepted. All documents submitted in response to this RFO will become the property of the State of California. Government Code Section 100508(a)(1) exempts from disclosure under the Public Records Act all deliberative processes, communications, or portions of negotiations with entities contracting or seeking to contract with the Exchange and entities with which the Exchange is considering a contract. Included within the exemption are score sheets and offers submitted by Vendors for purposes of competing for a contract. The Exchange may, at its discretion, waive this exemption.

5. FINAL OFFER REQUIREMENTS DETAIL

Final Offers must contain all information required in this RFO and must conform to the format described.

5.1 Administrative Requirements

Final Offers will be assessed on a pass/fail basis to verify compliance with all Administrative Requirements. Administrative requirements include all the non-technical requirements and requirements covering the responsibility aspects of the bidder, to all of which the bidder must comply. Examples are rules for submitting a bid, bid format, and the inclusion of all information in the bid as required by this RFO.

5.1.1 All Final Offers must be submitted within the timelines specified in Section 1.2 of this RFO.

5.1.2 One (1) hard copy marked "Master", four (4) additional hard copies, and one (1) electronic copy submitted on CD, shall include the following 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 available at: www.documents.dgs.ca.gov/osp/pdf/std204.pdf.
5. A signed Federal Debarment Certification (Attachment 1-B).
6. A completed certification form showing, upon award of the contract, the Bidder/Contractor agrees to provide a completed Title 22, California Code of Regulations 1230000 Statement of Economic Interests, Form 700 (Attachment 1-D).
7. A completed certification form showing, upon award of contract, the Bidder/Contractor agrees to provide an Acceptable Use Security Policy Acknowledgement Form (Attachment 1-E).
8. A completed Darfur Contracting Act Certification (Attachment 1-G).

5.2 Response Requirements

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

5.2.1 Understanding and Approach

Include a description of your understanding of the project's goals, emphasizing your understanding of the objectives and the major activities that must be performed to complete the work. Discuss your strategy for providing a draft solicitation document within the time period allocated for that task. Provide a table showing hours per week by person covering the contract term, with specific detail identifying the specific times related to the development, design and delivery components. Include your expectations of all entities outside your own team. Provide the assumptions used to develop the response (no more than fifteen (15) pages).

5.2.2 Resumes

Provide a resume of the relevant experience for each contractor staff person proposed. For each experience citation provided on a resume, the resume must include:

1. Total Duration: Indicate the start (month/year), end (month/year), and duration (total number of years and months) for each job experience submitted;

2. Description of Specific Experience: A complete description of the relevant experience, including identification of the client, name of the project, roles and responsibilities of the individual, and types of services provided by the individual.

5.2.3 Work Sample

Provide a sample of a training curriculum module developed to train staff in healthcare as identified in Section 3.4, D.2.

In addition, provide samples of materials in which the bidder conducted readability and written translations. Samples should be in English, Spanish and an Asian language, as identified in Section 3.4.,G.

The objective should be to provide work samples that illustrate the bidder's performance of similar work (e.g., training, readability, written translations and scripting, etc.).

5.2.4 References

Provide two references for each proposed individual. Include a current contact name, company name, and telephone number for each reference. Reference Contacts must be from a client who managed or supervised the proposed individual's work or who had oversight responsibility for the individual's performance for that work experience. The Reference Contact must be available to validate the experience provided on the dates specified in the resume. Bidders should note that references will be contacted and the results will be a factor in the evaluation and selection process.

Include the following information for each reference (maximum of two pages):

1. Engagement name and contract number
2. Brief description of the engagement
3. Contact name and title
4. Contact email
5. Contact phone

Exchange staff will contact referenced organizations when reviewing a Contractor's Offer to verify the information provided.

5.2.5 Costs

Responses shall provide total costs for term of this contract. Provide costs broken down by month in a table consistent with the one shown in Attachment 2-D. Provide hours by individual by week. 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 RFO.

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 the extended rate for that resource on that task

5.2.6 Contractor Qualifications

Describe and provide examples of the company's overall organizational capability and resources as they relate to the general requirements set forth in this RFO's Scope of Work (SOW), including the following (maximum of eight pages):

1. Ability to manage the project and the risks involved with the project.
2. Ability to complete projects on time (with an aggressive timeline) and within budget.
3. Ability to provide quality deliverables.
4. Evidence of the firm's experience performing the services outlined in this solicitation, including the total number of years the firm has been providing the services outlined in the SOW.

5.2.7 Team Qualifications

Describe the qualifications of each of the members of the proposed 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 their proposed role.

At a minimum, each of the Contractor's team members must have experience in many of the areas listed below; however, experience in all of the areas listed below must be addressed collectively as a team (maximum of two pages per individual):

1. Identifying and documenting business & training needs.
2. Identifying and documenting business & training requirements.
3. Adapting content from multiple sources into a cohesive and clear single programmatic approach.
4. Designing, developing, and delivery of blended Instructor Led Training and Computer Based Training programs.

5. Developing tools and reports for summarizing training effectiveness, success measurements and business impact.

6. Managing Training plan with coordination across multiple locations and concurrent training sessions

.

7. Performing readability, written translation (in culturally and linguistic appropriate manners) and focus group testing services.

8. Working with organizations and/or programs similar to the Covered California.

9. Producing high quality deliverables that require little or no rework.

10. Packaging overall program and materials for ongoing development by Covered California staff.

11. Demonstrating capacity to perform the work outlined in the Scope of Work.

12. Program and project management.

5.2.8 Project Management Approach

Describe the project management approach the Contractor proposes to take to accomplish the requirements outlined in the SOW on time and within budget, and for meeting customer quality expectations.

Identify the tools the Contractor proposes to use and the project management products it will produce as part of managing the Staff training project (maximum of 15 pages, including charts).

5.2.9 Understanding and Description of the Tasks to be Performed (Work Plan)

Include a description of your understanding of the SOW. Emphasize your understanding of the Exchange'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 the Exchange'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 the 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.

5.2.10 Assumptions

Document any assumptions the Contractor is making about the SOW, the responsibilities of the Contractor and the Exchange, and any other issues that are relevant to the Contractor's Offer and ability to do the work for the proposed cost (Maximum of five pages).

6. REVIEW OF FINAL OFFERS FOR AWARD/SELECTION CRITERIA

6.1 Written Responses to this RFO will be evaluated in two phases

Phase 1- Administrative Requirements. The Selection Team will review adherence to all Administrative Requirements.

Phase 2 - Review of the understanding and approach, resumes, and work sample. This review will cover three areas:

1. Understanding of the required work and commitment of adequate resources to meet the deadlines.
2. Individual staff experience as described in resumes.
3. Relevance and quality of work sample.

6.2 Interviews

After Phase 3, 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 the Exchange. The specific staff to be interviewed will be agreed upon between the Exchange and the bidder at the time the interview is scheduled.

6.3 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 in healthcare as identified in Section 3.2, Background, new product launch and State of California Department of Health Services projects as described in the attached SOW.
The table below lists the evaluation categories and the weights each will carry in the overall evaluation of each offer:

Criteria	**Points**
Administrative Requirements	50
Understanding and Approach	100
Corporate Qualifications	100
Applicability and quality of work sample	200

Staff Qualifications	100
References	50
Interview score	100
Cost	100
Totals	**800**

Preference Programs if applicable	**Points**
Small Business	25
DVBE Participation 5% or Over	25
DVBE Participation 4% to 4.99% inclusive	15
DVBE Participation 3% to 3.99% inclusive	10
DVBE Participation 2% to 2.99% inclusive	7
DVBE Participation 1% to 1.99% inclusive	5

The response that is most highly rated 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 from among the substantially equal responses shall be recommended for selection.

6.3.1 Evaluation of Understanding and Project Management Approach, Contractor Qualifications, and Engagement Team Qualifications

The Exchange Evaluation Team will evaluate offers in the four areas:

1. Understanding and Approach
2. Applicability and quality of work
3. Engagement Team Qualifications
4. Project Management and Approach

6.3.1.1 Understanding and Approach

Scoring of this factor shall be based upon the Evaluation Team's assessment of the Bidder's understanding of and insight into the challenges, issues, and risks faced by the Exchange in managing the launch of Covered California services project, and the feasibility, efficiency, and expected effectiveness of the approaches offered by the Bidder to provide assistance to the Exchange. Evaluators will assign scores based upon information contained in the Bidder's Understanding and Approach Narrative. The Evaluation Team will consider, in descending order of importance:

1. Quality of the Bidder's approach to addressing the scope of responsibilities and activities, including how the Bidder will provide the flexibility to address issues as they arise, while maintaining a high level of quality in their services approach;
2. Quality of the Bidder's approach to early identification of issues and risks, and how the approach will directly contribute to resolution and mitigation; and
3. Demonstrated understanding of the key characteristics of large, complex government projects in general, and projects such as the services described in this RFO.

Scores will be assigned in accordance with the rating scale shown below, “Understanding and Approach Scoring Key”.

Understanding and Approach Scoring Key

RATING	EVALUATION TEAM ASSESSMENTS	POINTS
Outstanding	Understanding and approach clearly demonstrates unusual insight and/or creativity.	90 - 100
Acceptable	No reservations or minimal reservations about bidder’s understanding and approach.	89- 75
Marginal	Material reservations about bidder’s understanding and approach.	74- 45
Unacceptable	Understanding of the project and client needs clearly deficient.	44- 0

6.3.1.2 Corporate Qualifications

The Exchange seeks a Vendor with significant capacity to respond to Exchange needs during the entire duration of the contract, support a high degree of qualified staff continuity, and a consistently high level of individual team member performance.

Two factors will be scored for corporate qualifications and resources, with each factor carrying equal weight within the corporate qualifications and resources evaluation. Evaluation and scoring of each of these factors are described below.

1. Corporate Description and Background: Scoring of this factor will be based upon the Evaluation Team's assessment of corporate resources, capacity, and historical track record as they relate to these services. Evaluators will assign scores based upon the bidder's Corporate Qualifications narrative. Scores will be assigned in accordance with the rating scale shown below, Corporate Qualifications Scoring Key.

Corporate Qualifications Scoring Key

RATING	EVALUATION TEAM ASSESSMENTS	POINTS
Outstanding	High degree of confidence in corporate capabilities and resources.	90 - 100
Acceptable	No reservations or minimal reservations about corporate capabilities and resources.	89 - 75
Marginal	Material reservations about corporate capabilities and resources.	74 - 45
Unacceptable	Corporate capabilities and resources clearly inadequate.	44 - 0

2. Projects in Progress or Completed within the Last Three Years

Scoring of this factor will be based upon the Evaluation Team's assessment of the breadth, depth, and relevance to the services requirements of recent bidder experience, as well as corporate resources and capacity as indicated by the characteristics of projects. Evaluators will assign scores based upon information contained in the Corporate Experience Summary Form. Scores will be assigned in accordance with the rating scale shown below, Projects Completed or in Progress Scoring Key.

Projects Completed or in Progress Scoring Key

RATING	EVALUATION TEAM ASSESSMENTS	POINTS
Outstanding	Extensive, highly relevant corporate experience clearly demonstrated.	90 - 100
Acceptable	No reservations or minimal reservations about extent or relevance of corporate experience.	89 - 75
Marginal	Material reservations about extent or relevance of corporate experience.	74 - 45
Unacceptable	Extent of corporate experience clearly inadequate or irrelevant.	44 - 0

6.3.1.3 Staff Qualifications

Staff qualifications carry the most weight of the non-cost factors used in determining the bidder that will be selected for the healthcare training program service engagement for a variety of different audiences. The Exchange seeks a team of highly qualified, senior staff to provide high-level project management support services on the training services project. The following sections describe the evaluation and scoring of staff qualifications.

1. Staff Experience and Credentials

   Scoring of this factor shall be based upon the Evaluation Team's assessment of the breadth, depth, and relevance of each proposed team member's experience and credentials. Evaluators will assign scores based upon information contained in Resumes and Staff Experience Summary Forms. The Evaluation Team will consider, in descending order of importance:

   a. Demonstrated capacity to successfully assume responsibility comparable to that proposed for the individual in the services support engagement;
   b. Demonstrated capacity to perform at a high level in multiple areas of project management;
   c. General breadth and extent of experience, as indicated by the number of projects, and duration of individual involvement in each;
   d. Relevance of experience as indicated by the scope and subject matter of project experience; and
   e. Relevance of education, training, and certifications.

   Scores will be assigned for each individual in accordance with the rating scale shown below, Staff Experience and Credentials Scoring Key.

Staff Experience and Credentials Scoring Key

RATING	EVALUATION TEAM ASSESSMENTS	POINTS
Outstanding	A seasoned, senior individual, with demonstrated capacity to perform successfully as a high level project management Contractor in multiple areas on similar large, complex projects.	90 - 100
Acceptable	No reservations or minimal reservations about this individual's capacity to perform at a high level in the healthcare training services environment.	89 - 75
Marginal	Material reservations about this individual's capacity to perform at a high level in the healthcare training services environment.	74 - 45
Unacceptable	Demonstrated experience clearly inadequate or irrelevant.	44 - 0

6.4 Cost Score

3. Cost (100 points)

   Each bidder's cost score will be calculated based on the ratio of the lowest cost offer to the bidders cost, multiplied by the maximum number of cost points available (100), as shown in the calculation below:

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

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	$\frac{\$300,000}{\$400,000}$ X 100	75
B	$350,000	$\frac{\$300,000}{\$350,000}$ X 100	86
C	$300,000	$\frac{\$300,000}{\$300,000}$ X 100	100

7. PREFERENCE PROGRAMS

7.1 Small Business Preference

Small Business Regulations: This RFO does not include a minimum Small Business (SB) participation preference. However, bidders are encouraged to sub-contract with SB.

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 firm 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.

7.2 Target Area Contract Preference Act (TACPA) / Enterprise Zone Act (EZA) & Local Agency Military Base Recovery Preference Request (LAMBRA)

This RFO does not include TACPA, EZA, or LAMBRA preferences. However, during the RFO process, contractor(s) may apply for the preference. Contractor(s) are encouraged to review the package carefully to ensure that their submittals conform to the programs' preference requirements. See http://www.pd.dgs.ca.gov/disputes/default.htm .

1. See Target Area Contract Preference Act (TACPA) forms at: http://www.pd.dgs.ca.gov/edip/tacpa.htm
2. See Enterprise Zone Act (EZA) forms at: http://www.pd.dgs.ca.gov/edip/eza.htm
3. See Local Agency Military Base Recovery Act (LAMBRA) forms at: http://www.pd.dgs.ca.gov/edip/lambra.htm

7.3 Disabled Veteran Business Enterprise (DVBE) – Declaration & Program Requirements

This RFO does not require bidders to meet the minimum DVBE participation percentage or goal. A bidder must complete and submit the **Bidder Declaration** – Attachment 1-K with its offer 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.

7.3.1 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 RFO, 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: Offer Checklist
1-B: Federal debarment, suspension, ineligibility and voluntary exclusion – certification
1-C: FORM 700 Statement of Economic Interest Certification
1-D: Staff Experience Form
1-E: Bidder Instructions
1-F: Payee Data Record
1-G: Darfur Certification
1-H: DVBE Declaration
1-I: Bidder Declarations
1-J, K, L: TACPA/EZA/LAMBRA

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
2-H: Exhibit F – Travel Reimbursement Information