

## RFP 2021-30 General Agents Contracts for CCSB

<p>1. In section 4.3.3.c of the RFP Secondary Template – did the author mean to write “renewals” and instead wrote “referrals?” Referrals doesn’t make sense in the context of what GA’s do.</p>	<p>Yes, please provide a response for Renewals.</p>
<p>2. We’d like to request that more pages be allocated to certain subsection of section 4.3 – Technical Requirements. We can’t fully respond to the information requested in the space allotted. Specifically, we’d request new page allocations for the following sections:</p> <ul style="list-style-type: none"> <li>○ Section 4.3.1 – Understanding and Approach – five pages rather than three pages</li> <li>○ Section 4.3.6 – Marketing Activities – five pages rather than three pages.</li> </ul>	<p>Agree to the request. All sections of 4.3- Technical Requirements must be no more than 5 pages. Corrected in Addendum #1.</p>
<p>3. What is STD 832?</p>	<p>We have no requirement for this document.</p>
<p>4. What is STD 831?</p>	<p>We have no requirement for this document.</p>
<p>5. STD.213 did not pull up a valid PDF. When will that be available?</p>	<p>STD 213 was included in the Attachment files. This document must be open using an Adobe reader.</p>
<p>6. The model Exhibit templates have a place to enter an agreement number in the header. Does that number get entered by Covered California, or do we enter a number as a current GA with an contract?</p>	<p>If contract is awarded, Covered California will provide the contract number.</p>
<p>7. Will a red-lined version of the new contract vs the prior contract be provided in time to review the changes and prepare a final RFP by the due date of 7/22/2022 at 12 PM PST?</p>	<p>A red lined comparison will not be provided.</p>
<p>8. The initial email invite to respond to RFP 2021-30 mentioned an “attached letter,” could you please confirm if there was supposed to be an attached document or if all necessary materials are included in the RFP Details &amp;</p>	<p>This was a typo and it should read as “Please see the attached link below for details on how to submit a for this contract” All the requirements necessary are included in the RFP 2021-30.</p>

Downloads listed on the Solicitations webpage?	<a href="https://hbex.coveredca.com/solicitations/#RFP-2021-30">https://hbex.coveredca.com/solicitations/#RFP-2021-30</a>
<p>9. <b>1.5 Contract Amount.</b> Will we continue to be paid the GA override based on the override at the effective date of sale as long as the group continues to be in force? For example, our override for a group written 1/1/22 would be based on our current contract. This current override would continue to be the same beyond 9/1/22 (the date the new Covered CA contract would go into effect)? Any new business written 9/1/22 and beyond would have the new contract's agreed upon commission.</p>	<p>That's correct. A group whose effective date was prior to 9/1/22 would be paid based on the contracted commission rate at the time the group was effectuated, if the group remains in-force. Any new CCSB business with an effective date of 9/1/22 and after would be subject to the new commission rate.</p>
<p>10. <b>2.2 Project Team Desirable Qualifications</b> is listed in the Table of Contents but is missing from the RFP. Can you please provide more information if applicable?</p>	<p>Please disregard this section in the Table of Contents. Corrected in Addendum #1.</p>
<p>11. <b>Section 4, Required Proposal Submission Content</b> includes bullets for Project Team Qualifications, Resumes, and Past Projects Completed, however these are not outlined like other bullets in the Administrative Requirements and Technical Requirements. Could you please outline what information you are looking for regarding these three items?</p>	<p>The section in question should read as below. These sections are outlined in detail in Section 4.3.</p> <ul style="list-style-type: none"> <li>• Technical Requirements <ul style="list-style-type: none"> <li>○ Understanding and Approach</li> <li>○ Corporate Qualifications Summary</li> <li>○ Operational Information and Data</li> <li>○ Sales Statistics &amp; Projections</li> <li>○ Project Assumptions</li> <li>○ Marketing Activities</li> <li>○ Compensation</li> </ul> </li> </ul>
<p>12. Section 4.2.2 Item iii : Is the proof of liability insurance required for each and every CA employee? Only field based employees? A corporate policy?</p>	<p>Generally, a corporate policy should suffice so long as it covers all employees/contractors performing services on behalf of the organization.</p>

<p>13. 4.3.4 : are the sales statistics and projections requested for CCSB groups only?</p>	<p>Statistics and Projections are requested for all small business group members (both on exchange and off exchange).</p>
<p>14. In Exhibit C – General Terms &amp; Conditions, sections II and JJ can you:</p> <ul style="list-style-type: none"> <li>a. explain the definition of “Consultant”</li> <li>b. explain when a Consultant would be required to file a form 700</li> <li>c. tell us where we can find a description of the “California Attorney General’s Ethics Training Course for State Officials”</li> </ul>	<p>General Agents will not be required to file Form 700s for this agreement or take Ethics Training. Sections JJ and KK are standard provisions required in all state agreements, but they will not apply to this particular contract.</p>
<p>15. Exhibit A - We think someone may have used an exhibit meant for a different type of contract since so much of the language does not apply to general agents.</p>	<p>The Exhibit A provided in the Solicitation is for the CCSB General Agent Contract.</p>
<p>16. I received this late last evening and am concerned that we may not be in a position to meet the deadlines articulated within this RFP. The calendars for those executives who will be helping us through this process are already full and so it is difficult to expect them with 3 days’ notice, to thoroughly review this and submit questions. Further, answers to those questions will be published just days before our responses to the RFP are due which further challenges our ability to absorb and respond, accordingly. I am also concerned about the practicality of this as we are already starting to issue small business quotes for September 1<sup>st</sup>.</p> <p>We certainly want to articulate what we are doing and intend to do to further support Covered California’s mission but I’m worried these the timelines may compromise the entire vetting process. In essence, we are hoping that we can be given more time so that we can provide you a clear picture of who we are and how we intend to continue to support your efforts.</p>	<p>Covered California is unable to make changes to the Key Action Dates outlined in the RFP Secondary Template.</p>

