

PROPOSER'S CONFERENCE

RFP 2024-06:
OUTREACH AND SALES EVENT PLANNING
AND MANAGEMENT SERVICES

JUNE 18, 2025 | 2 PM - 3 PM PDT

Hosted By: Covered California Outreach and Sales Team
Contact Email: HBEXSolicitation@covered.ca.gov



Thank you for joining us. You will not hear any audio until we begin the webinar.

WEBINAR HOUSEKEEPING

WEBINAR PLATORM & TECHNICAL SUPPORT	<ul style="list-style-type: none">This session is hosted on GoToWebinar. If you experience technical issues, use the “Question” function to notify our support team. Microphones are muted to avoid distractions. If needed, try refreshing your browser or rejoining the webinar for assistance.	
RECORDING DISCLAIMER	Please note that this webinar is being recorded. The recording, along with the slide deck will be published on our solicitation webpage for future reference.	
AUDIO OPITONS	<ul style="list-style-type: none">COMPUTER AUDIO: Use your computer audio for the best sound quality.DAIL-IN OPTION: You can join by phone by entering the Access Code and press the pound/hash tag (“#”).PHONE-ONLY ACCESS: Dialing in without webinar visuals allows you to hear the presentation but not see the slides or presenters.	<p>DIAL-IN BY PHONE: 1 (631) 992-3221</p> <p>ACCESS CODE: 682-324-398</p> <p>AUDIO PIN: Will display after joining the webinar.</p> <p>WEBINAR ID: 997-416-371</p>
SUBMITTING QUESTIONS & COMMENTS	<ul style="list-style-type: none">Use the GoToWebinar “Questions” feature to submit your questions or comments.Any unanswered questions will be included in the RFP Questions and Answers document after the webinar is completed.	
AFTER THE WEBINAR CONTACT	For additional questions or comments after the webinar, please email Covered California Contracts Team at HBEXSolicitation@covered.ca.gov .	

WELCOME TO COVERED CALIFORNIA!

Jamie Shigetoshi
Chief of Sales Channel Management

WELCOME TO COVERED CALIFORNIA!



- Covered California is **California's health insurance marketplace** established under the Affordable Care Act (ACA).
- It is a **state-run program** that allows individuals, families, and small businesses to compare, purchase, and enroll in health insurance plans.
- Covered California provides access to **affordable health insurance options** and helps eligible Californians qualify for **financial assistance**, such as premium subsidies, to reduce the cost of coverage.

AGENDA

- Team Introductions
- Covered California Overview
- Outreach and Sales Overview & Looking Forward
- RFP 2024-06 Overview
- Q&A Session

TEAM INTRODUCTIONS

Karolyna Sandoval, Sales Operations Manager

Eli White, Account Services Senior Manager

Marc Ross, Sales Program Specialist

Keith Glenn, Sales Program Specialist

Adrienne Cariveau, Sales Program Specialist

Melissa Bates, Field Support Analyst

COVERED CALIFORNIA OVERVIEW

Jamie Shigetoshi, Chief of Sales Channel Management

COVERED CALIFORNIA'S PROMISE

Vision:

To improve the health of all Californians by assuring their access to affordable, high-quality care.

Mission:

To increase the number of insured Californians, improve health care quality, lower costs and reduce health disparities through an innovative, competitive marketplace that empowers consumers to choose the health plan and providers that give them the best value.

COVERED CALIFORNIA'S STRATEGIC PILLARS

Affordable Choices	Quality Care	Organizational Excellence	Reaching Californians	Catalyst for Change	Exceptional Service
We connect consumers to financial assistance and a choice of affordable providers that give them the best value.	We ensure consumers consistently receive accessible, equitable, high-quality care.	We foster a nimble culture of continuous improvement that empowers and motivates our team to deliver on our mission with high standards.	We are unwavering in our pursuit to reach Californians and connect them to comprehensive and affordable coverage.	We pioneer new ideas and disseminate our learnings to drive improvement in health care in California and nationally.	We provide the highest level of service and exceed our consumers' expectations.

Diversity, Equity and Inclusion

We apply this lens in all our work to improve the health and experience of our consumers and to create and support a workforce reflective of our core values and the people we serve.



KEY FACTS ABOUT COVERED CALIFORNIA



Affordable Care Act in California



Self-Funded Agency – funded through a fee on insurance carriers



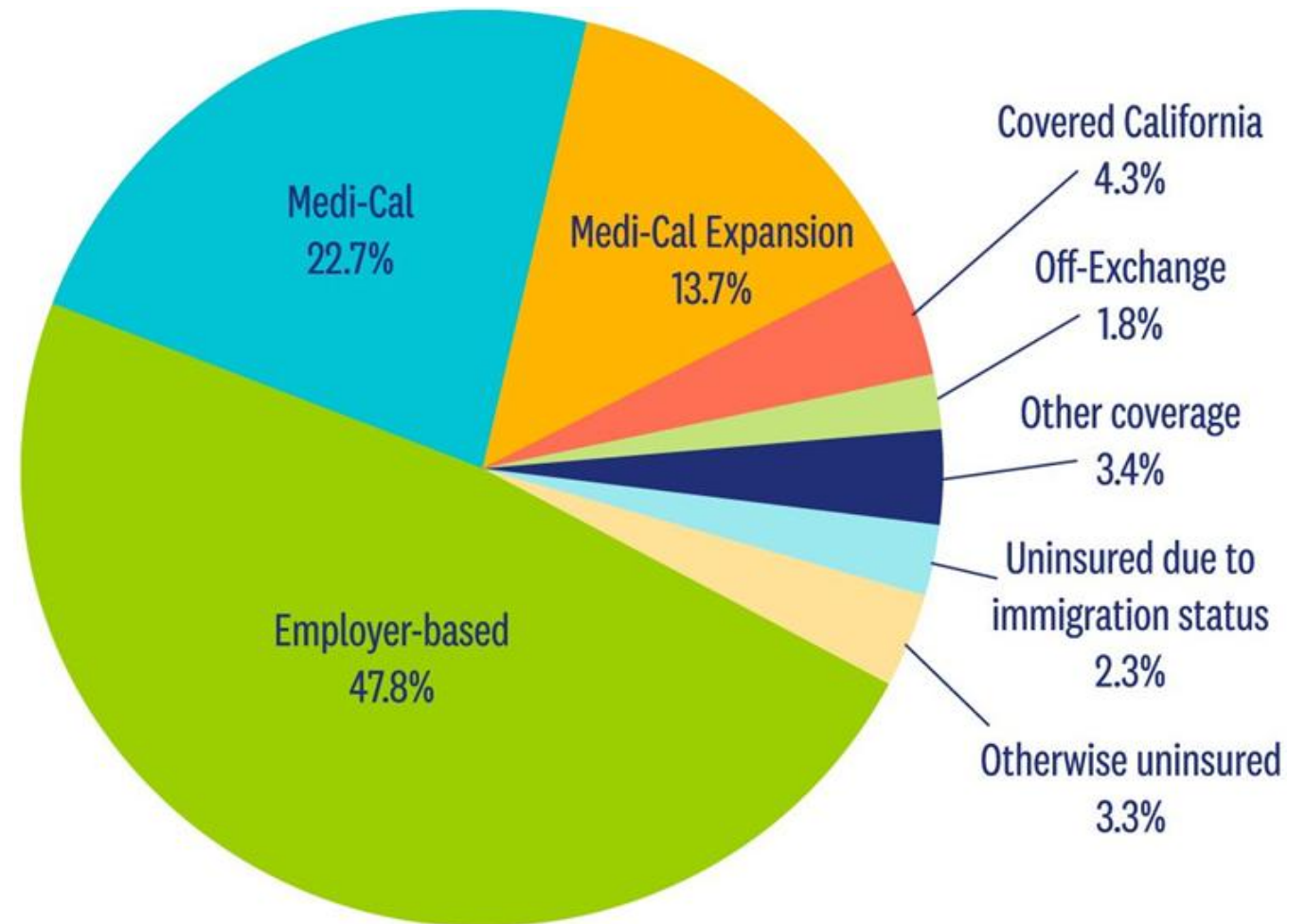
Active Purchaser – Individual, Small Business, negotiate rates



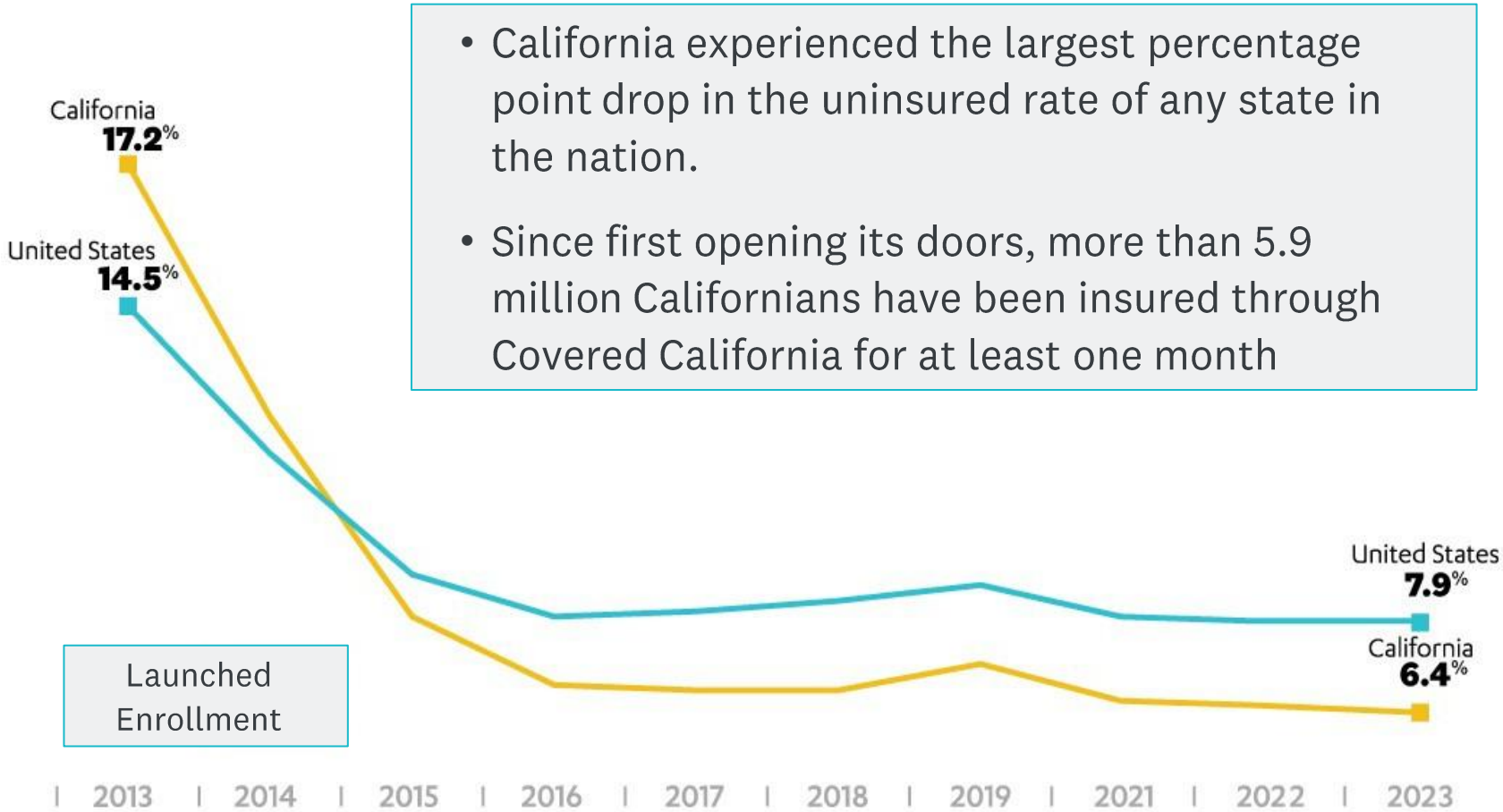
Only place that consumers and small businesses can get financial assistance to make insurance more affordable

HEALTH INSURANCE MARKET IN CALIFORNIA

The Affordable Care Act has dramatically changed the health insurance landscape in California with the expansion of Medicaid, Covered California and new protections for all Californians.



COVERAGE EXPANSION HAVING DRAMATIC EFFECTS IN CALIFORNIA



5.9
MILLION
Consumers Served

Source: Membership dashboard: Membership Dashboard 7.9.24 draft: Membership Dashboard -data.coveredca.com

*Source: American Community Survey, 2022 -American Community Survey Accuracy of the Data (2022) (census.gov). The rates for uninsured are shown for populations of all ages. The American Community Survey (ACS) is an annual demographics survey program conducted by the U.S. Census Bureau. U.S. Census data on California's uninsured rate in 2020 has been delayed due to the pandemic and is not reflected. The ACS data for the rate of uninsured is available through 2022.

PLAN INFORMATION

PLAN BENEFITS OFFERED

HEALTH COVERAGE FOR INDIVIDUALS & FAMILIES



2025 PLAN OFFERINGS



- Covered California provides quality health coverage from private health insurance companies with PPO and/or HMO products.
- Health insurers offer a wide variety of doctors and hospitals.
- These 12 insurers meet all the state and federal requirements for health plans, plus additional standards set by Covered California.
- All Californians will have a choice of 2 or more carriers.
- 92% Californians will have a choice of 3 or more carriers
- 85% Californians will have a choice of 4 or more carriers

IMPORTANT: Not all health plans are offered throughout the state of California. The health plans you can get depend on your ZIP code.

DENTAL COVERAGE FOR CHILDREN & ADULTS



Children's Dental Coverage

- All health plans include dental care for children at no extra cost.
- Optional to enroll children in a family dental plan for supplemental coverage.

Adult's Dental Coverage:

- For adults, a family dental plan can be added to your health plan purchase.

Anthem 

blue 
california

California DENTAL

 DELTA DENTAL®

Humana

IMPORTANT: Not all dental plans are offered throughout the state of California. The dental plans you can get depend on your ZIP code.

VISION COVERAGE FOR CHILDREN & ADULTS

Children's Vision Coverage

- **Children** under age 19 get free vision care included with their Covered California health plan.



Adult's Vision Coverage

- We've chosen three vision insurance companies to provide vision care for our consumers.
- Adults can enroll directly with these companies, all of which offer excellent benefits.



Adult Vision | Covered California™

ELIGIBILITY & ENROLLMENT

WHAT CONSUMERS NEED TO KNOW

COVERED CALIFORNIA ELIGIBILITY RULES TO APPLY FOR COVERAGE



Be a **California resident** or person who intends to reside in California



Be a **U.S. citizen** or **lawfully present** in the U.S.



Not be incarcerated.

FINANCIAL HELP ELIGIBILITY REQUIREMENTS

Eligibility for financial help and the amount is determined by the following factors:

- Household **income**,
- Household **size**,
- **Age** of household members,
- **Location** of the household (which determines the **pricing region**), and
- **Not being enrolled** in Minimum Essential Coverage (MEC) or have MEC **made available** to them.

Members who received financial assistance from the federal premium tax credit in advanced and must file their federal taxes to reconcile the advanced premium tax credit amount with the IRS.



FINANCIAL HELP FROM THE FEDERAL GOVERNMENT THROUGH COVERED CALIFORNIA

Advanced Premium Tax Credits (APTC)

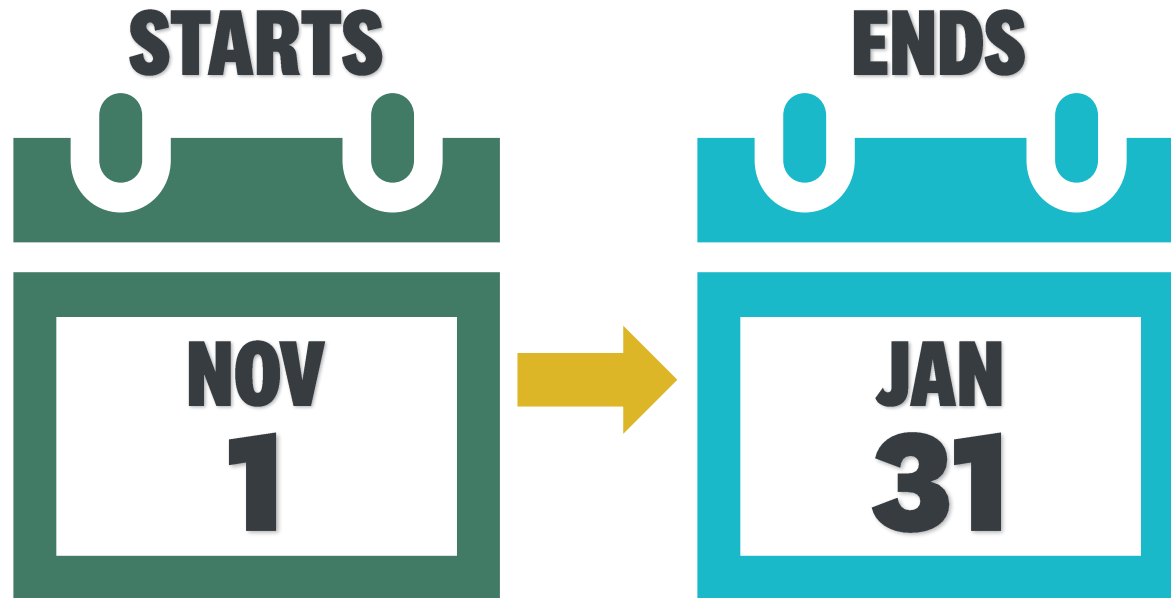
- Helps lower monthly health insurance premiums.
- Based on household income and family size.
- Subsidies are applied directly to monthly premiums for a Covered California plan.
- Allows households choose a plan that fits their budget with reduced premiums.

Cost-Sharing Reductions (CSR)

- Lowers out-of-pocket costs, such as deductibles, copayments, and coinsurance.
- Household income must be between 100% and 250% of the federal poverty level.
- Must enroll in a Silver-tier plan to receive CSR benefits.
- Enhances the value of the Silver plan, reducing costs for care. Makes healthcare services more affordable when using the plan.

ENROLLING DURING THE OPEN ENROLLMENT PERIOD

OPEN ENROLLMENT PERIOD*



- Open Enrollment is the time each year to sign up for health insurance.
- Consumers can choose a new plan, change their current plan, or apply for help to lower their costs.

*Dates are may change based on federal requirements for the 2026 plan year.

ENROLLING DURING THE SPECIAL ENROLLMENT PERIOD

GET COVERED
WITHIN 60 DAYS OF
**a big life
change.**



Consumers will need a **Qualifying Life Event (QLE)** to enroll in a plan.

- Year-round health insurance outside the open enrollment period.
- Most special-enrollment periods last 60 days from the date of the major life change.
- For most qualifying life events, consumer's coverage will start on the first day of the following month after they select a plan.

SEE ALL QUALIFYING LIFE EVENTS:
[MAJOR LIFE CHANGES](#)

COVEREDCA.COM & QUICK QUOTE CALCULATOR

- Find out if you qualify for financial help or Medi-Cal
- Compare Plans
- Find enrollment help
- Create an Account and Enroll
- Mirrored Spanish website + landing pages in core Asian languages

The screenshot shows the 'Quick Quote' calculator on the CoveredCA website. The interface is split into two main sections: a white input area on the left and a blue results area on the right.

Input Fields:

- Household Income:** \$ 24,000
- ZIP Code:** 91764
- Household Size:** 1 (dropdown menu)
- How many need coverage?:** 1 (dropdown menu)
- When do you want to start coverage?:** 2025 (dropdown menu)
- Age of People Needing Coverage:** 30

A 'Calculate' button is located at the bottom right of the input section.

Quick Quote Results (Blue Panel):

- Quick Quote:** \$7 per month (indicated by a green checkmark in a circle).
- for a Silver plan. Bronze plans as low as \$0.**
- After financial help from: Covered California**
- Financial Help: \$359 per month** (with a green checkmark icon).
- Bronze, Gold and Platinum plans also available** (with a green checkmark icon).
- A red 'Continue' button is at the bottom right.

SHOP & COMPARE TOOL ONLINE

DOCTOR SEARCH

PLAN RATES

FINANCIAL HELP AMOUNTS

<https://apply.coveredca.com/lw-shopandcompare/>

Answer these questions to find out if you qualify for help to lower your health care costs.

Coverage Year:

2025

What is your Zip Code? ⓘ

91764

What is your total household income per year? ⓘ

\$24000

How many people are in your household? ⓘ

1

Enter the age of each person in your household, and tell us if they need coverage.

Age of Head of Household:

30

☒ Needs Coverage?

☐ Pregnant? ⓘ







☐ Blind or Disabled? ⓘ

See My Results

WAYS CONSUMERS CAN APPLY FOR COVERED CALIFORNIA

It's easy.

- Apply on our website.
- Call us.
- Get free, confidential help by a certified enroller.

<p>Featuring Storefronts</p>  <p>Find a Local Enroller</p> <p>Visit an enroller in your area who can walk you through your health plan options.</p> <p>Find an Enroller →</p>	<p>For New Enrollees</p>  <p>Help on Demand</p> <p>Have a certified enroller call you. Most calls are returned in under 15 minutes.</p> <p>Help on Demand →</p>	 <p>Local Medi-Cal Offices</p> <p>For those who want to apply for Medi-Cal health coverage.</p> <p>Local Medi-Cal Offices →</p>
 <p>Call Us</p> <p>Speak with one of our representatives during our regular business hours.</p> <p>(800) 300-1506 →</p>	 <p>Live Chat</p> <p>Chat online with a representative during our regular business hours.</p> <p>Chat Now →</p>	 <p>Events</p> <p>Find events near you where you can sign up or get help.</p> <p>Find Events Near You →</p>

CALIFORNIA PENALTY & EXEMPTIONS

Effective January 1, 2020, California residents must either:

- Have qualifying health insurance coverage, *or*
- Pay a penalty when filing a state tax return, *or*
- Get an exemption from the requirement to have coverage.

The penalty for not having coverage the entire year will be at least **\$900 per adult** and **\$450 per dependent child under 18** in the household when they file your 2024 state income tax return in 2025. A family of four that goes uninsured for the whole year would face a penalty of at least \$2,700.

<https://www.ftb.ca.gov/file/personal/filing-situations/healthcare/estimator/>

It may actually cost you *less* to get covered than to pay the tax penalty.

For example, a 30 year-old individual living in Los Angeles, making \$18,000/year would pay more to NOT have health coverage.

Get COVERED	OR	Pay the PENALTY
\$0 per year		at least \$900 per year



OUTREACH AND SALES OVERVIEW & LOOKING AHEAD

Karolyna Sandoval, Sales Operations Manager

OUTREACH AND SALES TEAM

WHO WE ARE AND WHAT WE DO

MISSION

The purpose of the Outreach and Sales Division is to **educate, support, and empower Covered California's 20,000 sales partners** in order to inform, facilitate and expand the number of eligible individuals enrolled in affordable, quality health care coverage.



WHO WE ARE & WHAT WE DO

The Outreach and Sales has three branch teams supporting and managing our certified insurance agents, navigators, and non-compensated community sales partners.

INDIVIDUAL FAMILY PLAN MARKET

Sales Operations branch administers the oversight and management of the sales channel partners agreements, certifications, communication, tools, data analytics, and enroller portals.

Sales Channel Management branch manages the relationships of sales channel partners ensuring they received the support, tools, and services needed to enroll consumers effectively.

COVERED CALIFORNIA FOR SMALL BUSINESS (CCSB)

CCSB team provides the administration oversight of the small business exchange and sales support to certified insurance agents who sales these plans.



SALES CHANNEL MANAGEMENT TEAM



ACCOUNTS SERVICES

- Navigator Grant Program Management
- Certified Enrollment Entities/Counselors (Navigators)
- Certified Application Entities/Counselors (Voluntary, Non-Compensated)
- Community Partners (Non-Certified Enrollers)

MISSION

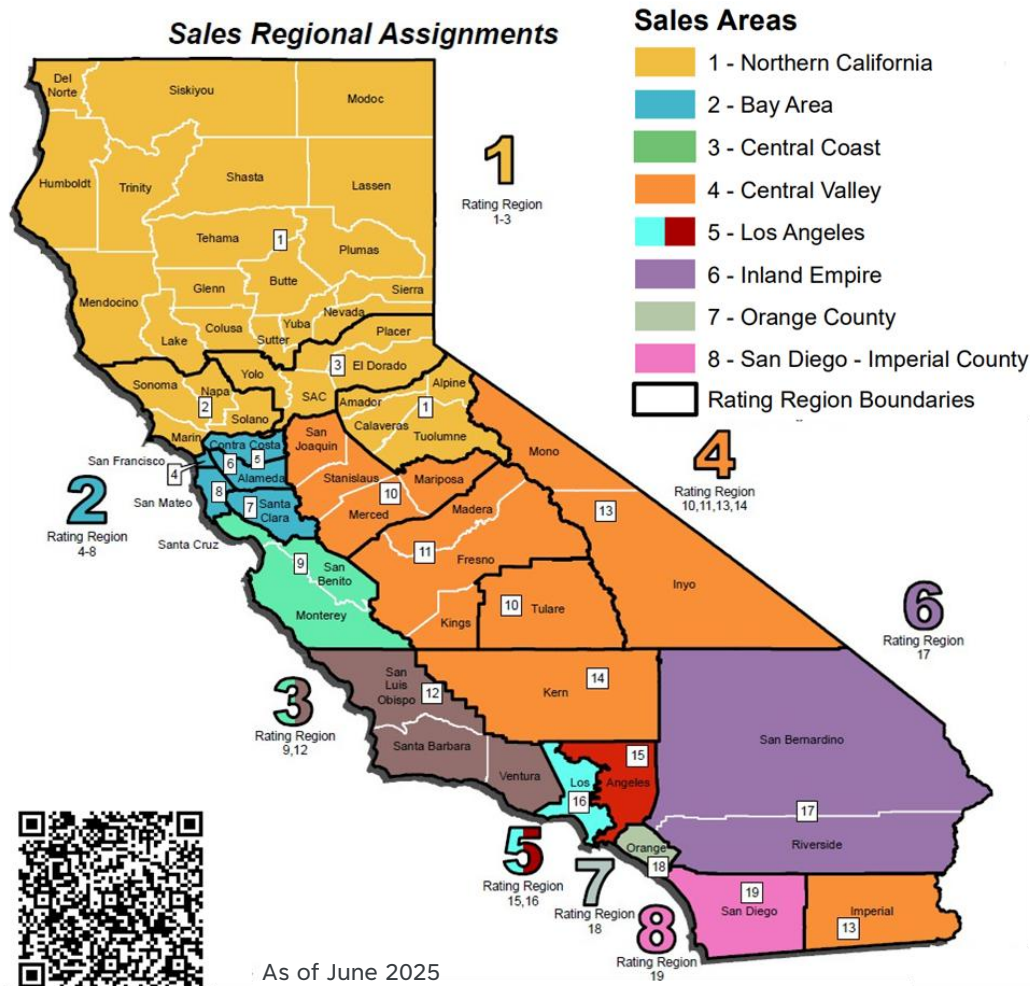
To **provide the best customer support and sales strategy direction** to all Covered California Sales Channel Partners by **assuring their access to tools and resources** for consumer outreach, education, enrollment, and retention.



FIELD OPERATIONS

- Agent Channel Management
- Top Statewide & Regional Agencies
- Inside Sales Program Support
- Marketing, Outreach, and Enrollment Assistance (MOEA) Advisory Group
- Public & Private Business Development

SALES REGIONAL FIELD & ACCOUNT REPRESENTATIVES



- **8 Sales Area:** Northern California, Bay Area, Central Coast, Central Valley, Los Angeles, Inland Empire, Orange County, and San Diego
- **6 Field Representatives** support regional agents in sales territories.
- **2 Strategic Partnership Managers** oversee top 25 agencies statewide.
- **4 Account Services Representatives** support Navigators and Certified Application Counselors statewide.

SALES CHANNEL MANAGEMENT RESPONSIBILITIES



AGENT CHANNEL

RELATIONSHIP
MANAGEMENT



NAVIGATOR PROGRAM

GRANT
MANAGEMENT



OUTREACH & SALES LEAD GENERATION

CONSUMER
ENROLLMENT



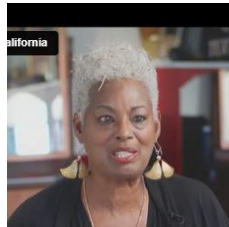
EDUCATION & TRAINING

MARKETPLACE
KNOWLEDGEBASE



SALES ENABLEMENT

STRATEGIC
PLANNING



REAL PEOPLE CAMPAIGN

MEMBER
TESTIMONIALS



STAKEHOLDER ENGAGEMENT

COMMUNITY
NETWORKS



SPECIAL PROJECTS

SUPPORTING
COVERED CALIFORNIA

WHO WE SUPPORT



CERTIFIED INSURANCE AGENTS

AGENT PROGRAM

Voluntary
Paid Commission by
Health, Dental, and Vision
Plans

*Direct Relationships with the
top 250 Agencies*



CERTIFIED ENROLLMENT COUNSELORS (CEC)

NAVIGATOR GRANT PROGRAM

Competitive Application
Paid by grant dollars by
Covered California

*Direct Relationships with
all 37 Entities*



CERTIFIED APPLICATION COUNSELORS (CAC)

CAC PROGRAM

Voluntary
Non-Compensated

*Engage with the top 50
Entities*



PLAN BASED ENROLLER (PBE)

Plan Based Enroller Program

Voluntary
Non-Compensated
Qualified Health Plan or
Medi-Cal Managed Care Plan

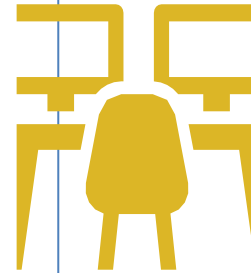
*Provide admin support as
needed*

OUTREACH AND SALES ENROLLER SUPPORT



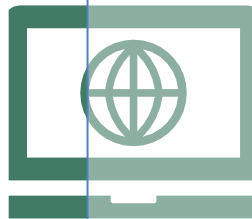
Education & Training

- Staff Training: policy updates, impacts to consumers, how enrollers can help
- Enroller In-Person Training: roundtables, kick-off meetings, enroller site visits, etc.
- Webinar Informational Videos
- Certification & Recertification Modules



Enroller & Tools Support

- Enroller Toolkit
- Alerts & e-Briefs
- Enroller Quick Guide
- Talking Points & Messaging
- Help On Demand Tool, website language update to highlight support for Medi-Cal Transitioners
- Enroller Reports of Medi-Cal Transitioners



Enroller Support Opportunities

- Sales Lead Generation Projects
- Enroller Storefront in office ads
- Enroller Social media posting
- Enroller Ads on their website
- Enroller Email campaigns to clients
- Enroller Community partnership referrals

ANNUAL SALES KICK-OFF EVENTS = TRAININGS

OPEN ENROLLMENT EVENTS

Annually

August – September

9-16 Event Locations Across the State

In-Person with between 50-300 attendees per event

90% agents, 7% community partners, 3% others (plans, counties, elected officials, advocates, etc.)

Topics: Plan products, rates, networks, policies, system, tools, resources, etc.



Annually

March-May

9-13 Event Locations Across the State

In-Person with between 50-300 attendees per event

90% agents, 7% community partners, 3% others (plans, counties, elected officials, advocates, etc.)

Topics: Qualifying life event updates, policies, system, tools, resources, etc.



SPECIAL ENROLLMENT EVENTS



June 18, 2025 Proposer's Conference
RFP 2024-06: Outreach and Sales Event Planning and Management Services

SALES LEAD GENERATION CONTRACT

- June 1, 2021 – May 31, 2023
- Executed campaigns with media partners & community organizers
 - Digital partners on social media sites
 - TV stations
 - Radio stations
 - Signature and Community Events
- Targeted Languages: English-African American, English – General Market, Cantonese, Mandarin, Hmong, Korean, Tagalog, Vietnamese, Spanish, Armenian, Farsi, Punjabi, Russian, and Ukrainian
- Focused on a direct call to action messaging for consumers to contact Covered California Certified Enrollers for free, confidential help with enrollment.



OPEN ENROLLMENT 2025 PLAN SELECTIONS*



7%

25,725

32%

109,201

61%

210,471**

LOOKING AHEAD 2025-2027

WAYS TO SUPPORT OUR ENROLLERS MOVING
FORWARD IN MEETING OUR MISSION.

A LOOK AT THE PAST 12 YEARS

SIGNATURES EVENTS



Approximately 30+ signature events in communities throughout California

Partnered with various media partners and community stakeholders to participate

Coordinated with hundreds of sales partners to attend and educate consumers

- Approximately 600 event locations
- Thousands of attendees participating
- Trainings, roundtables, events, workshops are held.



FACILITY MANAGEMENT

LOOKING FORWARD FOR FISCAL YEARS 2025-2027

SIGNATURES EVENTS



Approximately 10 major signature events in communities throughout California

Partnered local trusted community stakeholders to participate

Work with hundreds of sales partners to attend and educate consumers

- Approximately 120 events
- Thousands of attendees participating
- Trainings, roundtables, events, workshops are held.



FACILITY MANAGEMENT

CHALLENGES & OPPORTUNITIES

SIGNATURES EVENTS



Application and Registration
Requirements

Short Notice for State Contracting and
Payment Process

Materials Distribution for Events

Lack of Venue Resources within Budget
State Contracting and Payment Process
Inability to produce timely event
materials development for events
Technology support



FACILITY MANAGEMENT

FINDING THE RIGHT PARTNER

- **Collaborative Agency Partner**

- Support Covered California's mission, goals, and priorities.
- Work with the Outreach and Sales Division team and enrollment partners to increase insured Californians and reduce health disparities through culturally relevant promotions.
- Empower consumers to choose health plans and providers offering the best value.

- **Strategic Partner**

- Manage event and facility coordination as outlined in the agreement.
- Oversee project deliverables to ensure successful execution.

- **Guidance and Implementation**

- Provide strategic guidance to subcontractors, consultants, and vendors.
- Ensure deliverables are multi-market, culturally relevant, and in-language.



REQUEST FOR PROPOSAL 2024-06 OVERVIEW

Eli White, Senior Manager for Account Services

RFP 2024-06 SOLICITATION HOUSEKEEPING

Reminders:

- Open Procurement
- RFP #: RFP 2024-06
- Questions, email HBEXsolicitation@covered.ca.gov
 - Include “RFP 2024-06” in the subject line
- Phone calls will not be accepted.
- The Proposer may submit only one (1) proposal for this RFP. If a proposer submits multiple proposals, Covered California will only review the most recently submitted proposal.

RFP 2024-06 SOLICITATION WEBSITE

Solicitations

RFP 2024-06 Outreach and Sales Event Planning and Management Services

The purpose of this solicitation is to solicit proposals from qualified Proposer to provide a full range of event planning and facilities management services, including but not limited to strategic planning, logistics, vendor management, technology integration, maintenance, security, and sustainability practices.

Details & Downloads

Details & Downloads:

- [Addendum 1](#)
- [RFP 2024-06 Outreach and Sales Event Planning and Management Services](#)
- [Model Contract Exhibits](#)
- [Attachments](#)

<https://hbex.coveredca.com/solicitations/>

**Check the Covered
California Solicitation
Website for updates**

RFP 2024-06 KEY ACTION DATES

Request for Proposal Release Date:	June 3, 2025
RFP Questions Due Date and Time:	June 6, 2025, by 3:00pm
Proposers' Conference:	June 11-18 , 2025 by 2:00 PM
Responses to Questions Posted By:	June 13-20 , 2025
Proposal Due Date and Time:	June 27, 2025, by 3:00pm July 3, 2025 by 4:00 PM
Notice of Intent to Award:	Week of July 10-17 , 2025
Anticipated Contract Term:	August 1, 2025, to July 31, 2027

All times noted in this document are Pacific Time (PT).

RFP 2024-06 PROJECT TEAM MINIMUM QUALIFICATIONS

All required minimum qualifications are outlined in the RFP 2024-06 solicitation document – Section 2.1, Project Team Minimum Qualifications as follow:

1. **Proven Experience and Expertise:** Proposers must demonstrate significant experience and a successful track record in both event planning and facilities management, showing their ability to handle complex projects and deliver exceptional results.
 - The project team must have a minimum of three (3) years of experience in event planning and management, specifically in securing facilities for meetings and events of various sizes and coordinating event registration and payment systems. Demonstrated expertise in negotiating contracts with venues and suppliers to ensure favorable terms and conditions for clients.
2. **Comprehensive Service Offering:** The ability to provide a full range of services in both event planning and facilities management, including but not limited to, strategic planning, logistics, vendor management, technology integration, maintenance, security, and sustainability practices.

RFP 2024-06 PROJECT TEAM MINIMUM QUALIFICATIONS (CONT.)

3. **Qualified Personnel:** Proposers should have a team of highly skilled and experienced professionals in event planning and facilities management, including project managers, coordinators, technical experts, and support staff.
 - The Project Manager designated for this contract must have at least five (5) years of direct experience in event management, with a proven track record of successfully managing events from conception through to completion. Must possess strong leadership skills and have experience managing cross-functional teams.
4. **Financial Stability and Management:** Evidence of financial stability and the ability to efficiently manage budgets and resources, ensuring the proposer can sustain operations and fulfill commitments without interruption. Proven ability to manage event budgets effectively, with experience in providing detailed financial reports and ensuring projects are delivered within the agreed budget.
5. **Compliance:** Compliance with all relevant local, state, and federal regulations, including health and safety codes, accessibility standards, and environmental laws.

RFP 2024-06 PROJECT TEAM MINIMUM QUALIFICATIONS (CONT.)

6. **Technological Proficiency:** Demonstrated proficiency in utilizing the latest technology and software solutions for event management and facilities operations, including event registration platforms, building management systems, and sustainability monitoring tools. Experience in integrating registration and payment platforms with other systems (e.g., CRM, email marketing tools) is required.
7. **Risk Management and Insurance:** Adequate risk management strategies and insurance coverage, including liability insurance, to protect Covered California against potential risks associated with event planning and facilities management activities.
8. **Customer Service Excellence:** A strong commitment to delivering high-quality customer service, with proven strategies for engaging with stakeholders, addressing concerns, and exceeding expectations in service delivery. Demonstrated ability to communicate effectively with clients, vendors, and event participants. Must have a customer service-oriented approach, with a commitment to addressing and resolving any issues promptly.

RFP 2024-06 PROJECT TEAM MINIMUM QUALIFICATIONS (CONT.)

9. **Sustainability and Efficiency Practices:** A commitment to sustainability and efficiency, with demonstrated practices and initiatives that align with Covered California's values and contribute to reducing environmental impact and promoting social responsibility.
10. **References and Case Studies:** Provision of references and case studies from previous projects that showcase the proposer's capabilities, innovation, and effectiveness in delivering integrated event planning and facilities management services.
11. **Covered California:** Shall have knowledge of the California individual health insurance market.

Important Note:

Conflict of Interest: No conflict of interest under Covered California's Conflict of Interest Code, California Code of Regulations, the Political Reform Act, and any other applicable state or federal statutes.

RFP 2024-06 CONTRACT TERM & AMOUNT

Contract Term

- The initial term of the contract shall be for two (2) years, from August 1, 2025, to July 31, 2027; however, the contract term is subject to change and may be amended.

Contract Amount*

- Proposal submissions shall not exceed \$400,000.00 in total proposed costs.
- Amount not exceed approximately \$200,000.00 per year for the term of the contract, including any extensions of the term.

*Funding is subject to annual budget approval by the Covered California Board of Directors. If full funding does not become available, Covered California may terminate or amend the contract to reflect reduced funding and reduced deliverables.

RFP 2024-06 SCOPE OF WORK (SOW), EXHIBIT A

- The SOW (Exhibit A) will become part of the resulting contract.
- The Agency of Record (AOR) is responsible for all deliverables.
- SOW is purposefully broad.
- Covered California will maintain control over the priority and weight given to each item in the SOW.
- Spending, projects and activities confirmed by signed estimates and work orders.

Exhibit A - Scope of Work, Section D: Project Deliverables

- **Section D.1.a & b:** Coordination of Sales and Outreach Initiatives
- **Section D.2:** Venue Procurement for Education and Training
- **Section D.3:** Technology Support
- **Section D.4:** Facility Procurement for Storage

RFP 2024-06 ADMINISTRATIVE REQUIREMENTS:

REQUIRED ATTACHMENTS

To be deemed responsive, Proposers must comply with the Administrative Requirements in this section.

Required attachments

- Proposals must include the following required attachments as set forth below. Any attachment that requires a signature must be signed by a representative authorized to contractually bind the Proposer organization. Photocopies of wet signatures and electronic signatures are acceptable.
 - i. The Proposal Cover Page form (Attachment 1) completed and signed;
 - ii. The Payee Data Record (STD. 204) form (Attachment 2) completed and signed;
 - iii. The Contractor Certification Form (Attachment 3) completed and signed;
 - iv. The Statement of Economic Interests Certification form (Attachment 4) completed and signed;
 - v. The Bidder Declaration (GSPD-05-105) form (Attachment 5) completed and signed; and
 - vi. The Proposal Checklist form (Attachment 6) completed.

RFP 2024-06 ADMINISTRATIVE REQUIREMENTS:

REQUIRED DOCUMENTS

To be deemed responsive, Proposers must comply with the Administrative Requirements in this section.

Required documents

- Proposals must include the following required insurance documents:

- A Certificate of Liability Insurance equal to or greater than \$1,000,000*;
- Proof of Workers' Compensation Liability Insurance;
- Proof of Automobile Liability Insurance*, including non-owned auto liability, of \$1,000,000 per occurrence for persons used by the Contractor for services provided pursuant to this contract; and
- Proof of Professional Liability Insurance*.

*Refer to the RFP 2024-06 Solicitation document for further instructions if you do not have a proof of a Certificate of Liability Insurance and/or a Certificate of Automobile Liability Insurance and/or Proof of Professional Liability Insurance with its proposal

RFP 2024-06 ADMINISTRATIVE REQUIREMENTS:

UPDATED MODEL CONTRACT WITH EXHIBITS

Proposers must make any suggested changes to the Model Contract as instructed in the RFP Solicitation document.

Updated Model Contract with Exhibits

- Submission of Model Contract exhibits without suggested tracked changes will constitute acceptance by the Proposer of the exhibits as drafted.

1. Using the **Model Contract Exhibit A – Scope of Work** provided, include a revised Exhibit A – Scope of Work with suggested tracked changes in Microsoft® Word®.
2. Using the **Model Contract Exhibit B – Budget Detail and Payment Provisions** and Exhibit B, Attachment 1 – Cost Worksheet provided, include a revised Exhibit B – Budget Detail and Payment Provisions with suggested tracked changes in Microsoft® Word®.
3. Using the **Model Contract Exhibit C – General Terms and Conditions** provided, include a revised Exhibit C – General Terms and Conditions with suggested tracked changes in Microsoft® Word®.

RFP 2024-06 ADMINISTRATIVE REQUIREMENTS:

GENERATIVE ARTIFICIAL INTELLIGENCE (GENAI)

Covered California seeks to realize the potential benefits of GenAI, through the development and deployment of GenAI tools, while balancing the risks of these new technologies.

GenAI Reporting and Factsheet (HBEX 707)

- Proposer must notify the State in writing if their solution or service includes, or makes available, any GenAI including GenAI from third parties or subcontractors.
1. Proposer must notify the State in writing if their solution or service includes, or makes available, any GenAI including GenAI from third parties or subcontractors.
 2. The State has developed a [GenAI Reporting and Factsheet](#) to be completed by the Proposer.
 3. Failure to submit the GenAI Reporting and Factsheet (HBEX 707) will result in disqualification of the Proposer.
 4. Failure to report GenAI to Covered California may void any resulting contract. Covered California reserves its right to seek any and all relief it may be entitled to as a result of such non-disclosure.

RFP 2024-06 TECHNICAL REQUIREMENTS

- **Understanding and Approach** (No more than ten (10) pages.)
 - Proposers must provide a narrative and Work Plan demonstrating their understanding of project goals, objectives, and major activities, along with strategies for timely delivery, detailed weekly hours by person, expectations of external entities, and assumptions used to develop the response.
- **Corporate Qualifications Summary** (No more than three (3) pages.)
 - Covered California seeks a Proposer with strong corporate capacity, qualified staff continuity, and consistently high team performance.
 - Proposers must provide a narrative describing their capabilities and resources, including:
 - Project Management: Ability to manage the project and associated risks.
 - Timely Delivery: Proven ability to complete projects on time and within budget.
 - Quality Assurance: Capability to deliver high-quality results.
 - Experience: Evidence of experience performing SOW services, including total years of relevant service.

RFP 2024-06 TECHNICAL REQUIREMENTS (CONT.)

- **Project Team Qualifications** (No more than three (3) pages.)
 - Covered California seeks a team of highly qualified senior staff, with additional technical and skill-based staff as needed, to fulfill the Scope of Work.
 - Proposers must:
 - Describe qualifications, experience, education, and skills of each team member based on their proposed role.
 - Identify roles and key points of contact for Covered California.
 - Specify the percentage of time each key staff member will dedicate to the Scope of Work outlined in Exhibit A.
- **Resumes**
 - Proposers must submit resumes for each project team member that highlight relevant experience.
 - Resumes must include:
 - Duration: Start and end month/year, along with total years and months of experience.
 - Description: Detailed account of relevant experience, including:
 - Client name, project name, roles/responsibilities, and services provided.
 - Only include work experience directly relevant to this RFP; unrelated experience will not be considered.

RFP 2024-06 TECHNICAL REQUIREMENTS (CONT.)

- **Past Projects Completed** (No more than two (2) pages.)
 - Proposers must provide narrative descriptions of up to five (5) projects completed in the past two (2) years that align with the tasks outlined in Model Contract Exhibit A – Scope of Work.
- **Project Assumptions** (No more than two (2) pages.)
 - Proposers must outline any assumptions regarding the Scope of Work, Contractor and Covered California responsibilities, or other factors relevant to the proposal and the ability to complete the work within the proposed cost.
- **Cost Proposal** (Cost Worksheet (Exhibit B, Attachment 1))
 - Proposers must specify the assessment fee percentage of their total cost proposal for the contract duration in the Cost Worksheet (Exhibit B, Attachment 1).
 - By signing Exhibit B, Attachment 1, the Proposer certifies the assessment fee percentage as binding for the entire contract term.

RFP 2024-06 COST PROPOSAL, EXHIBIT B, ATTACHMENT 1 - COST WORKSHEET

Page 1 – Cost Worksheet Insurance; Entity Information; Contact Information

RFP 2024-06 Outreach and Sales Event Planning and Management

Exhibit B, Attachment 1: Cost Worksheet

Cost Worksheet Instruction

1. Fill out the applying entity's details in the "Entity Information" section, located within the yellow-highlighted cells below.

2. Provide the details of the individual filling out this cost proposal in the "Contact Information" section, also highlighted in yellow.

3. Familiarize yourself with the terms and definitions utilized within the cost proposal table.

4. Go to the second page of this document and specify the proposed percentage for your entity's assessment fee concerning the project's deliverables in the designated yellow cells.

5. Review the total amount and detailed breakdown of the cost proposal, indicated by the blue-highlighted cells, for the contract.

Note: Refer to the sample cost worksheet on page 3 of this document for guidance.

Entity Information

Entity Name

Date

Contract Period

Project Summary and Scope

Years 1 & 2

Refer to Exhibit A - Scope of Work, Section D

Contact Information

Printed Name

Position (Job Title)

Date

Read the instructions!

Action required

Complete the yellow fields

- Entity Name
- Date
- Printed Name
- Position (Job Title)
- Date

RFP 2024-06 COST PROPOSAL, EXHIBIT B, ATTACHMENT 1 - COST WORKSHEET

Page 2 – Applicant’s Cost Proposal (Top Half)

APPLICANT'S COST PROPOSAL

Read the instructions on page 1 before filling out cells, F2-F5.

The cost proposal is based on the entity's assessment fee charged to the the contract dollar amount for years 1 and 2.

The table below is for a year period that will apply to contract year 1 and 2.

Gray cells are locked.

Yellow cells are for the entity to complete.

Light blue cells are the output data based on the yellow cells entries.

Action required

A	B	C	D	E	F	G	H	I
Item No.	Contract Reference	Project Deliverable Category	Max Budget for Deliverable	Max Fee Percentage Allowed	Entity's Assessment Fee Percentage (Enter the entity's proposed percentage here)	Entity's Assessment Fee Amount (Amount automatically calculated based on the percentage from column F of the value in column D.)	Procurement Cost (Automatically calculated based on the difference between columns D and G.)	Total Contract Cost (Automatically calculated based on the sum of columns G and H.)
1	Section D.1.a & b	Coordination of Sales and Outreach Initiatives	\$ 120,000.00	35%		\$ -	\$ 120,000.00	\$ 120,000.00
2	Section D.2	Venue Procurement for Education and Training	\$ 50,000.00	20%		\$ -	\$ 50,000.00	\$ 50,000.00
3	Section D.3	Technology Support	\$ 15,000.00	15%		\$ -	\$ 15,000.00	\$ 15,000.00
4	Section D.4	Facility Procurement for Storage	\$ 15,000.00	10%		\$ -	\$ 15,000.00	\$ 15,000.00
Total			\$ 200,000.00			\$ -	\$ 200,000.00	\$ 200,000.00

RFP 2024-06 COST PROPOSAL, EXHIBIT B, ATTACHMENT 1 - COST WORKSHEET (CONT.)

Page 2 – Applicant’s Cost Proposal (Bottom Half)

Action required

Review the total amount and detailed breakdown of the cost proposal, indicated by the blue-highlighted cells, for the contract.

	Amount	Percentage
Maximum Budget for Deliverables:	\$ 200,000.00	100%
Total Procurement Cost:	\$ 200,000.00	100%
Total Entity's Assessment Fee:	\$ -	0%

RFP 2024-06 EXHIBIT B, ATTACHMENT 1 - COST WORKSHEET --- SAMPLE ---

APPLICANT'S COST PROPOSAL

Read the instructions on page 1 before filling out cells, F2-F5.

Gray cells are locked.
Yellow cells are for the entity to complete.
Light blue cells are the output data based on the yellow cells entries.

A	B	C	D	E	F	G	H	I
Item No.	Contract Reference	Project Deliverable Category	Max Budget for Deliverable	Max Fee Percentage Allowed	Entity's Assessment Fee Percentage (Enter the entity's proposed percentage here)	Entity's Assessment Fee Amount (Amount automatically calculated based on the percentage from column F of the	Procurement Cost (Automatically calculated based on the difference between columns D and G.)	Total Contract Cost (Automatically calculated based on the sum of columns G and H.)
1	Section D.1.a & b	Coordination of Sales and Outreach Initiatives	\$ 120,000.00	35%	30%	\$ 36,000.00	\$ 84,000.00	\$ 120,000.00
2	Section D.2	Venue Procurement for Education and Training	\$ 50,000.00	20%	20%	\$ 10,000.00	\$ 40,000.00	\$ 50,000.00
3	Section D.3	Technology Support	\$ 15,000.00	15%	15%	\$ 2,250.00	\$ 12,750.00	\$ 15,000.00
4	Section D.4	Facility Procurement for Storage	\$ 15,000.00	10%	10%	\$ 1,500.00	\$ 13,500.00	\$ 15,000.00
Total			\$ 200,000.00			\$ 49,750.00	\$ 150,250.00	\$ 200,000.00

	Amount	Percentage
Maximum Budget for Deliverables:	\$ 200,000.00	100%
Total Procurement Cost:	\$ 150,250.00	75%
Total Entity's Assessment Fee:	\$ 49,750.00	25%

Proposed Entity's Assessment Fee

RFP 2024-06 EVALUATION AND SELECTION: PHASES

Phase One:

Administrative Requirements

- Covered California will review the administrative content of each proposal and assess it as either pass or fail in terms of Proposer responsiveness.
- Proposal submissions must include all required administrative content to earn a passing assessment; those that do not will be deemed non-responsive and will not be evaluated further.

Phase Two:

Technical Requirements

- The Covered California Evaluation Team will conduct a qualitative review of the technical content of each responsive proposal to determine how responsible each Proposer is by scoring the categories of Understanding and Approach, Corporate Qualifications Summary, Project Team Qualifications, and Past Projects Completed; Project Assumptions will not be scored.

RFP 2024-06 EVALUATION AND SELECTION: CATEGORIES AND CRITERIA

Technical Content Evaluation Categories	Weight	Points
1. Narrative Content	70% total	700 total
a. Understanding and Approach	20%	200
b. Corporate Qualifications Summary	10%	100
c. Project Team Qualifications and Resumes	10%	100
d. Past Projects Completed and Project Assumptions	30%	300
2. Cost Proposal (should be at least 30%)	30% total	300 total
Combined Total	100%	1000

RFP 2024-06 EVALUATION AND SELECTION: COST PROPOSAL

$$\frac{\text{Lowest assessment fee amount}}{\text{Proposer's assessment fee amount}} \times \text{Cost proposal points maximum} = \text{Cost proposal score}$$

Proposer	Proposed Total Assessment Fee	Calculation	Cost Proposal Score
A	\$55,750	$\frac{\$50,000}{\$55,750} \times 300$	269
B	\$61,000	$\frac{\$50,000}{\$61,000} \times 300$	246
C	\$50,000	$\frac{\$50,000}{\$50,000} \times 300$	300

RFP 2024-06 PROPOSER'S PACKAGE

The attachments listed here have been provided to potential Proposers by Covered California and are hereby incorporated into this RFP 2024-06 Solicitation Announcement document.

1. Required Attachments

Number	Name
1	Proposal Cover Page
2	Payee Data Record (STD. 204)
3	Contractor Certification Form
4	Statement of Economic Interests Certification
5	Bidder Declaration (GSPD-05-105)
6	Proposal Checklist
7	GenAI Reporting and Factsheet (HBEX 707)

2. Optional Attachments

Number	Name
2a	Payee Data Record Supplement (STD. 205)
8	Disabled Veteran Business Enterprise Declarations (STD. 843)

RFP 2024-06 MODEL CONTRACT WITH EXHIBITS

The model contract and exhibits listed below have been provided to potential Proposers by Covered California and are hereby incorporated into this RFP.

1. Model Contract A Standard Agreement (STD. 213) form will be the cover and signature page for the contract.
2. Exhibits
 - i. Exhibit A – Scope of Work
 - ii. Exhibit A, Attachment 1 – Work Authorization
 - iii. Exhibit B – Budget Detail and Payment Provisions
 - iv. Exhibit B, Attachment 1 – Cost Worksheet
 - v. Exhibit C – General Terms and Conditions
 - vi. Exhibit C, Attachment 1 – Resumes
 - vii. Exhibit D – Privacy Addendum
 - viii. Exhibit D, Attachment 1 – Security Contract Attachment
 - ix. Exhibit D, Attachment 2 – Privacy and Security Incident Intake Form
 - x. Exhibit E – Marketing and Branding Guidelines

RFP 2024-06 INTENT TO AWARD

Notice of Intent to Award

- Post on solicitation website

Protest Period

- 5-day protest period after notice of intent to award is posted

Estimated Contract Start Date

- August 1, 2025

QUESTIONS & ANSWERS

Marc Ross, Sales Program Specialist

HOW TO SUBMIT YOUR QUESTIONS NOW...

- Use the GoToWebinar “Questions” feature to submit your questions or comments.
- All questions and responses from today, including any unanswered questions, will be included in the RFP 2024-06 Questions and Answers document after the webinar.
- Visit the Covered California Solicitation webpage to access the RFP 2024-06 Questions and Answers document on June 20, 2025.



THANK YOU!

- OUTREACH AND SALES TEAM



HBEXSOLICITATIONS@COVERED.CA.GOV



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