



**RFP 2024-06: Outreach and Sales Event Planning and Management Services
Questions and Answers**

Published June 20, 2025

No.	Bidder Questions:	Covered CA - Response:
1.	Event Details <ul style="list-style-type: none">Can you please confirm the expected number events to be managed annually under this contract?	The internal team hosts approximately 60 events annually, while there are an additional 10-15 community events held each year for the public.
2.	Event Details <ul style="list-style-type: none">Has the date for the event(s) been set? If not, when is it expected to be finalized?	No, the dates are not yet finalized. However, the events are planned to take place during the following months: <ul style="list-style-type: none">Branch Meetings: Held once every monthFebruary/March: Spring RoundtablesMarch: Marketing, Outreach, and Enrollment Assistance (MOEA) Advisory Group MeetingApril: Special Enrollment Period Enroller WorkshopsMay-June: Tentative Field Representative Regional WorkshopsJuly/August: Summary RoundtablesAugust: MOEA Advisory Group MeetingSeptember: Open Enrollment Kickoff Events
3.	Event Details <ul style="list-style-type: none">Is the venue(s) already contracted? If so, could you please share the name and location?	No, we have a recommended list of facility locations based on previous usage. However, under this contract, the contractor will be responsible for providing their own recommendations that align with our specific criteria and requirements.
4.	Event Details <ul style="list-style-type: none">What is the projected number of attendees?	The number of attendees for internal team-hosted events ranges from 20 to 400, depending on the specific event. For community events, attendance varies widely, ranging from 50 to several thousand participants.

No.	Bidder Questions:	Covered CA - Response:
5.	Event Details <ul style="list-style-type: none"> In addition to consumers, enrollment partners, community-based organizations, healthcare stakeholders, and multilingual/multicultural audiences, can you further describe the anticipated attendee profile in terms of demographics (e.g., age, income level, ethnicity) and professional background (e.g., roles, industries, affiliations)? 	<p>In addition to consumers, enrollment partners, community-based organizations, healthcare stakeholders, and multilingual/multicultural audiences, the anticipated attendee profile is diverse in both demographics and professional backgrounds. Demographically, attendees are expected to represent a wide range of age groups, income levels, and ethnicities, reflecting California's diverse population. Professionally, attendees may include individuals from various roles and industries, such as healthcare professionals, policy advocates, non-profit organization leaders, educators, small business owners, and representatives from state and local government agencies. Many attendees are likely to have affiliations with organizations focused on health equity, outreach, and enrollment efforts, as well as stakeholders who play a key role in supporting Covered California's mission.</p>
6.	Event Details <ul style="list-style-type: none"> Will all event elements be held at a single venue, or are off-site events anticipated? 	<p>Events vary throughout the state. The majority are off-site events.</p>
7.	Program and Content <ul style="list-style-type: none"> Will the events include educational programming or training sessions? If so, can you provide an example agenda or describe the types of sessions typically offered? 	<p>Yes. Here's an example of an enroller workshop agenda, which may include, but is not limited to, the following topics:</p> <ul style="list-style-type: none"> Covered California News: Updates on federal and state regulations, legislation, and policies impacting consumers and partners. Consumer Marketing and Community Engagement Activities: Strategies and initiatives to engage and educate consumers effectively. Consumer Application System Updates: Enhancements and changes to the application system for consumers and enrollment partners. Health, Dental, and Vision Issuers' Updates: Information on plan rates, benefits, provider networks, and other key details. Enroller Tools and Resources: Training and resources to support enrollment partners in assisting consumers. <p>This agenda is designed to keep attendees informed, engaged, and equipped with the latest updates and tools to support Covered California's mission effectively.</p>

No.	Bidder Questions:	Covered CA - Response:
8.	Program and Content <ul style="list-style-type: none"> Who is responsible for selecting and contracting speakers? 	Covered California Outreach and Sales Team
9.	Program and Content <ul style="list-style-type: none"> Will there be a call for presentations process? 	No
10.	Program and Content <ul style="list-style-type: none"> What is the projected number of speakers? 	It varies depending on the event. Estimated at 1-8 speakers for a typical event.
11.	Program and Content <ul style="list-style-type: none"> Will continuing education credits be offered? If so, for which professions? 	We hope to offer education credits to our certified insurance agents in the future.
12.	Logistics and Operations <ul style="list-style-type: none"> Who is responsible for sourcing the venue(s)? Is that part of the contractor's scope? 	The contractor is responsible for sourcing the venues. However, Covered California will provide a recommended list of facility locations based on previous usage.
13.	Logistics and Operations <ul style="list-style-type: none"> Will there be an exhibition component? If so: <ul style="list-style-type: none"> What is the projected number of booths? Can you share a past exhibitor/sponsor prospectus if available? 	For signature events that Covered California plans to participate in, the event organizer will establish pre-determined criteria that we are required to follow. As a result, the number of booths or events in which we participate may vary. No, we are not able to share a past exhibitor/sponsor list at this time.
14.	Logistics and Operations <ul style="list-style-type: none"> Is there a volunteer component? If so, will volunteer recruitment and management be part of the scope? What is the expected number of volunteers? 	No, this will be under the Covered California Outreach and Sales Team's responsibilities.
15.	Logistics and Operations <ul style="list-style-type: none"> What type of badging is preferred for attendees and exhibitors? 	Some examples include, but not limited to, label stickers and lanyard with a plastic name badge holder.
16.	Logistics and Operations <ul style="list-style-type: none"> Are printed materials expected onsite, or will they be distributed digitally? 	Covered California will provide printed materials.

No.	Bidder Questions:	Covered CA - Response:
17.	Logistics and Operations <ul style="list-style-type: none"> Has a drayage company and/or decorator been engaged in the past? If so, by whom? 	Yes, a drayage company and/or decorator has been engaged in the past. These services were typically arranged by the facility staff, depending on the specific needs and requirements of the event, and not typically directly engaged by Covered California as part of the scope of this contract.
18.	Marketing and Communications <ul style="list-style-type: none"> What marketing assets will Covered California provide (e.g., logos, photos, video content)? 	Talking points, logos, photos, and video content.
19.	Marketing and Communications <ul style="list-style-type: none"> Does Covered California have a contact database for marketing? If so, how many contacts and what types (e.g., past attendees, partners)? 	Yes, Covered California maintains a contact database of 10,000+ certified enrollment channel partners. This is subcategorized by partner type (e.g. Insurance Agent, Navigator, Certified Application Counselor, Plan Based Enroller, etc.)
20.	Marketing and Communications <ul style="list-style-type: none"> Does Covered California use a specific marketing platform or CRM? 	Yes, Covered California uses Salesforce to maintain the database and iContact for messaging.
21.	Marketing and Communications <ul style="list-style-type: none"> Are there existing social media accounts to be used for promotion? If so, on which platforms? 	No.
22.	Registration and Technology <ul style="list-style-type: none"> Does Covered California have a preferred event registration system, or should the contractor propose one? 	We currently use Eventbrite, but we are open to considering proposals that detail how an alternative event registration system will meet the outlined scope of work and address our specific needs effectively. It should be noted that we currently use Salesforce as our CRM and are open to leveraging this system in our event registration process.
23.	Budget <ul style="list-style-type: none"> We would appreciate clarification regarding the stated budget of \$200,000 per year (not to exceed \$400,000 total). Specifically: <ul style="list-style-type: none"> Does this budget represent only the event management firm's professional service fee, or does it also include all direct costs associated with executing the events (e.g., venue rental, catering, A/V, travel, materials, etc.)? 	This includes all costs, including direct hard costs and the contractor's service fee. Please note that the contract does not cover travel expenses for the contractor.

No.	Bidder Questions:	Covered CA - Response:
24.	What is the attendance spread (i.e. 20-100 or more)?	20-400
25.	Are the events evenly split between NorCal and SoCal?	No. Events are conducted across the state to effectively engage with target populations.
26.	When the RFP references all work to be done on-site at Covered California in Sacramento, do you mean that all work is to take place there or that all Covered California contacts are headquartered there and that they are the agency to which we report? We are assuming that not all events are to take place in the Sacramento area.	This means that the contractor and their staff will be expected to report to Covered California headquarters in Sacramento as required. It is important to note that Covered California staff work remotely across the state. If an in-person meeting is necessary for specific projects, we will coordinate and schedule the most suitable location for the Covered California team to meet with the contractor's team. Additionally, all other events will take place at various locations throughout the state.
27.	How many in person meetings are the Contractors required to attend during the course of the contract?	This is to be determined once we review the proposal and onboard the contractor.
28.	As Contractors are to pay subcontractors and then be reimbursed by Covered California, are payments based on Contractor's deliverables? Is there a payment schedule that can be arranged?	A payment request schedule will be established based on the contractor's deliverables and invoices.
29.	The RFP references prompt payment. What is the net number of days that payments are distributed to Contractors?	Payments for deliverables on the required invoice will be disbursed within 45 business days after the invoice has been reviewed and approved by Covered California and the State Controller's Office. Please refer to the Model Contract, Exhibit B, for more information about the prompt payment act.
30.	Work Schedule – is this to be included in the proposal? If so, how do we do that if we don't know how many events are taking place?	The proposed work schedule is based on estimated timelines and number of events listed on Question No. 1 of this document; and will be adjusted as the number of events and specific requirements are finalized. Initial planning and preparation, including kickoff meetings and material development, will begin within the first few weeks of contract approval. Event execution will follow on tentative dates, with additional events scheduled as details become available. Post-event activities, such as reporting and invoicing, will be completed within two weeks after each event. The schedule is flexible and subject to updates as needed.

No.	Bidder Questions:	Covered CA - Response:
31.	The RFP references that PII stored requires a security guard. What is the nature of this PII and if we identified a storage facility that offered such, would that be acceptable?	Exhibit D, Attachment 1 has been removed per the RFP Addendum 3.
32.	Does Exhibit D, Attachment 2 need to be completed for the proposal, or is it an example to be used?	Exhibit D, Attachment 2 has been removed per the RFP Addendum 3.
33.	You indicate on the RFP various levels of security and indicate that this is a Tier 1 and then list several types of security designations. Are these security designations mandatory to hold before submitting the proposal? If not, will there be assistance in obtaining them if deemed necessary?	Exhibit D – Privacy Addendum, Exhibit D, Attachment 1 and Exhibit D, Attachment 2 has been removed per the RFP Addendum 3.
34.	Can you confirm if the \$400K is allocated solely for production service fees, excluding hard costs?	The \$400,000 contract total includes ALL costs, including all production service fees and hard costs.
35.	Do you have an event format or formats in mind?	Yes, there are some standard event formats we consistently use.
36.	Do you have a projected attendee count for each event?	Yes, for many of our events we are able to estimate attendee counts for room size.
37.	Has the funding already been secured or received?	Yes, funding for this contract has been secured. Covered California uses an annual budget cycle which requires approval by the Board of Directors, so while funding exists, allocation for each year must be approved as part of the budget cycle.
38.	Scope and Role Clarity <ul style="list-style-type: none"> Can you confirm whether the selected contractor will be responsible for end-to-end event production (e.g., strategy, content, programming, onsite staffing), or is the scope limited to venue logistics and vendor coordination? 	The scope is limited to venue logistics and vendor coordination.
39.	Scope and Role Clarity <ul style="list-style-type: none"> Is the contractor (and its team) expected to be onsite for the various events? 	No.

No.	Bidder Questions:	Covered CA - Response:
40.	Event Volume and Types <ul style="list-style-type: none"> Can you provide an estimated number, types, and sizes of events anticipated per year (e.g., public engagement, training sessions, workshops)? This will help us scope our staffing and budget model appropriately. 	See response for question one.
41.	Technology Expectations <ul style="list-style-type: none"> Are there existing platforms (e.g., Salesforce, registration tools, email marketing systems) already in place that the contractor will be required to integrate with? 	No.
42.	Technology Expectations <ul style="list-style-type: none"> Or is the contractor expected to provide and manage these systems independently? 	Yes. We look forward to seeing what systems the contractor can support Covered California in managing the deliverables outlined in this contract.
43.	Facilities Management Definition <ul style="list-style-type: none"> Can you clarify what is included under “facilities management”? Does this include onsite operational responsibilities such as AV oversight, custodial/security coordination, or is it strictly limited to venue procurement and storage rental? 	The scope is strictly limited to venue procurement, event registration, the development of tools for signature events, and storage rental.
44.	Subcontractor and Vendor Approval Process <ul style="list-style-type: none"> Is there a pre-approved vendor list or preferred diversity hiring goals the contractor must follow? 	No.
45.	Subcontractor and Vendor Approval Process <ul style="list-style-type: none"> Will subcontractor contracts and payments be subject to formal review or thresholds requiring multiple quotes? 	No, we do not currently require this. However, we expect the contractor to manage and maintain records of invoices or agreements to ensure documentation is readily available in the event of an audit.
46.	Assessment Fee Model <ul style="list-style-type: none"> Can you confirm whether the contractor’s assessment fee percentage is intended to cover all staffing, overhead, and profit? (And the remaining percentage is earmarked to pay for actual event costs – hotel, rental space, AV, décor, etc.) 	Yes, this is correct.

No.	Bidder Questions:	Covered CA - Response:
47.	Assessment Fee Model Are contractors allowed to bill any administrative fees or markups on reimbursable vendor costs?	No, the assessment fee is intended to cover any vendor cost or fee.
48.	Assessment Fee Model <ul style="list-style-type: none"> Can contractor receive commission directly from the hotel if booked for an event? (This is at no cost to Covered California) 	Yes. However, this amount should not be part of the invoice to Covered California as we do not pay for commission.
49.	Financial Viability <ul style="list-style-type: none"> Given the required upfront payments for vendors and the limited total budget (\$400,000 over 2 years), we are concerned about the viability of fulfilling all requested services while maintaining operational sustainability. Has Covered California considered offering direct payments to vendors or an alternative billing structure to reduce contractor cash flow burden? 	No, the purpose of this procurement is to hire a contractor who will take on the responsibility of securing venues to ensure efficiency and effectiveness in event management. Covered California as a state agency cannot support up front costs or payments.

No.	Bidder Questions:	Covered CA - Response:
50.	<p>Cost analysis</p> <p>Based on my calculation, the max a vendor can earn is \$55,750 for this contract per year. This equates to about \$5,575 per event. This does not give much room for cost and revenue. How extensive are these events, does the vendor need to be onsite for the event, are travel costs additional? I am not sure the budget is enough to execute the events at a high level given the pain points you described previously. Is there an opportunity to increase the budget?</p>	<p>The events outlined in the contract are designed to minimize the need for onsite presence by the contractor, except in specific circumstances where their presence is deemed necessary. For example, the contractor may need to be onsite to finalize the procurement of the venue or participate in critical pre-event preparations that require in-person coordination. On the day of the event, onsite participation by the contractor will only be required if deemed essential to ensure the event's procurement.</p> <p>Regarding travel costs, Covered California does not reimburse travel expenses. All services provided by the contractor, including any travel-related activities, must be accounted for within the entity assessment fee. This single line-item fee encompasses all associated costs for the services rendered.</p> <p>It is important to note that the costs for each event will vary depending on the scope, complexity, and specific needs. The assessment fee billed by the contractor will be determined based on these factors. This approach allows for flexibility in managing the financial aspects of the contract.</p> <p>Currently, we are unable to increase the budget for this contract. However, we encourage vendors to optimize their planning and execution strategies to ensure high-quality events within the existing financial framework.</p>
51.	Can you review the typical signature event... is it one day - full day, 2 hrs, etc.	This depends on the event itself. For Covered California hosted events, they are typically 3 hours long with an hour before and after for setup/break down. Signature events will depend on who is hosting the event.
52.	Are attendees paying for these events?	All Covered California hosted events will be free of charge to all participants. For signature events, there may be an admission fee associated with the event.
53.	What type of venues do you typically use for these events?	Some of the venues that we would typically use with their community halls or meeting spaces, convention style rooms. They have AV packages and microphones for Q&As. They can range from 20-300 people capacity.
54.	Would you consider lowering the number of events from 10 to 5 in order to allow greater event management costs?	This number is fluid and will be based on what our initiatives will be in our campaign for the year, so this number will fluctuate and change.

No.	Bidder Questions:	Covered CA - Response:
55.	So when you say the vendor would secure the facility. Are you saying your team will coordinate the logistics to include AV, F&B, Registration, Etc. for all events? Just want to be clear.	Yes, we will be coordinating internally to coordinate the day-of logistics for our events. Signature events may require some additional coordination with whomever is running that event.
56.	Are we able to charge an add'l admin fee to front the costs of event?	No.
57.	I am assuming site inspections are not required?	There may be a required inspection if we have not previously used a space. This may/may not be conducted by our staff or by the vendor. It depends on the venue.
58.	Will Covered Calif ship all materials required?	We do not anticipate the vendor being responsible for shipping materials.
59.	So for contract term there are 10 Signature event and 120 Facility Management events - what is the frequency of events? Can you clarify that the facility Mgmt events are those Tradeshow that you participate in	Signature events are events also like a mixed hybrid of community events to trade show events. There's 120 or more in the roundtable training informational style for the entire contract term. These are within more of our control and we have a whole team here that will facilitate and execute those. We would like the vendor to do is be able to help support us in finding venues for these locations. Signature events involve a hybrid of trade shows and other community events.

___ END OF DOCUMENT ___