

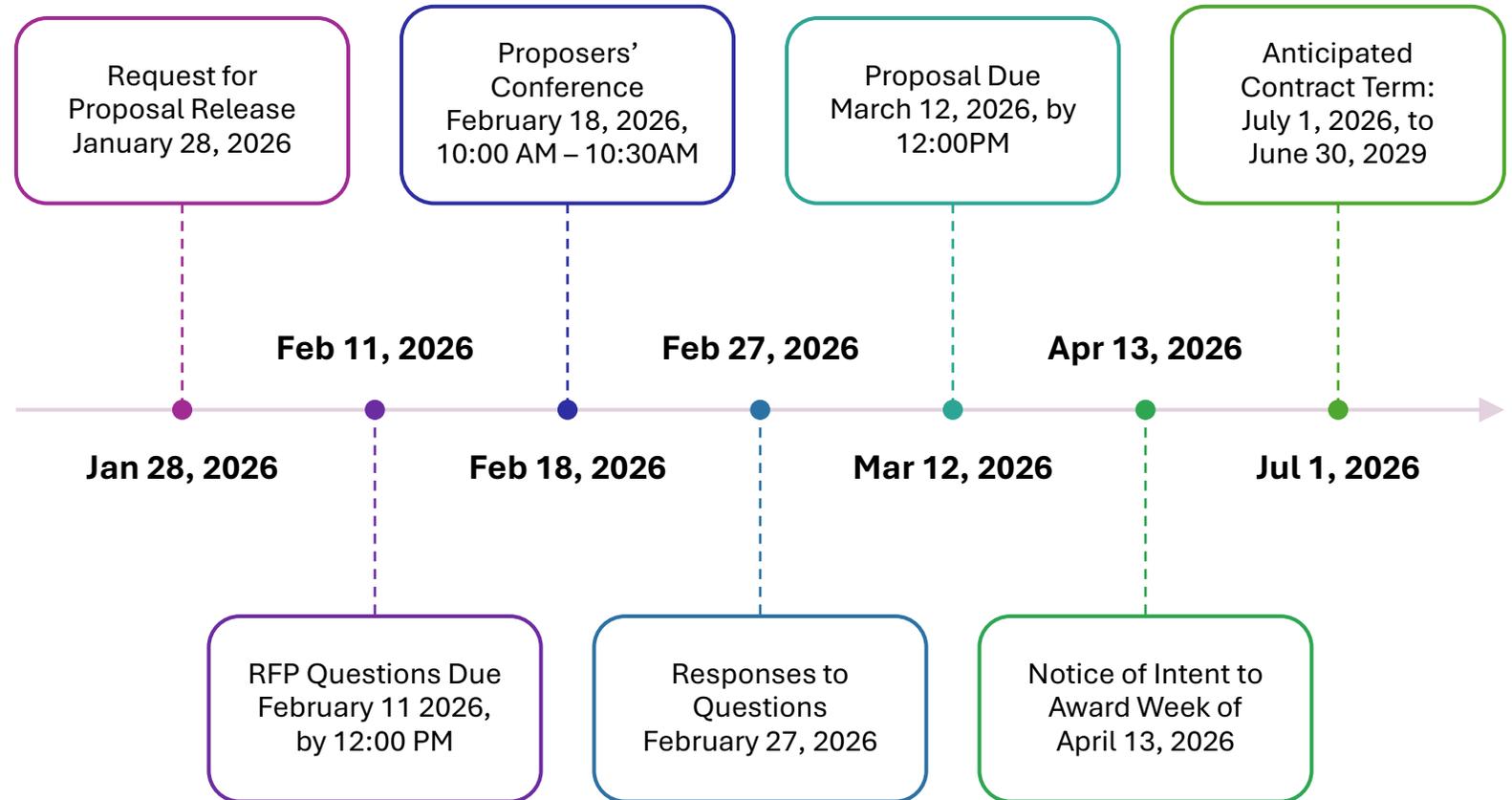


FOR **SMALL  
BUSINESS**

**Request for Proposal  
RFP 2025-09: CCSB Enrollment and  
Financial Management Services**

**Proposer's Conference  
February 18, 2026**

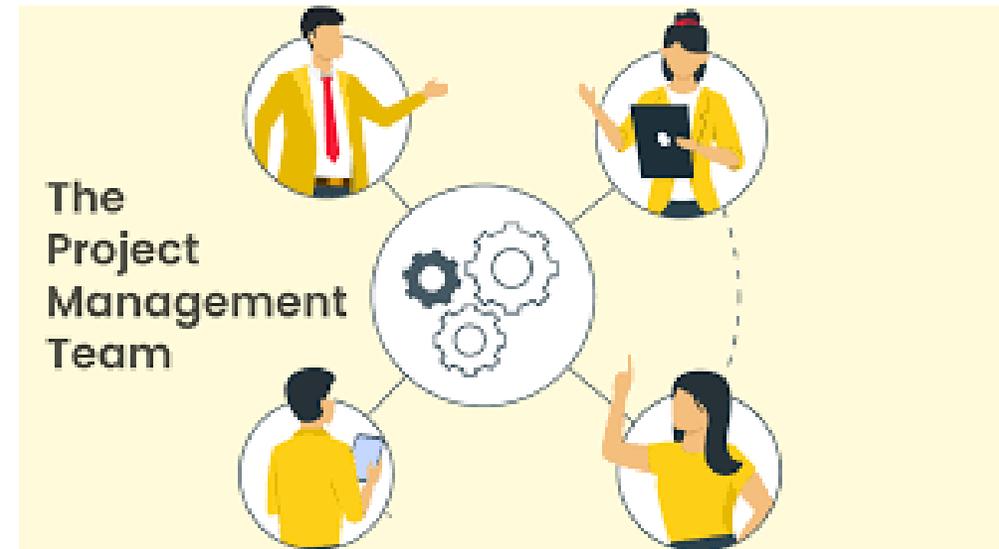
# RFP Key Dates



# Project Team Minimum Qualifications

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- **Vendor Project Leadership are to have the following experience:**
  - Eight (8)+ years' experience working with the health insurance industry.
  - Five (5)+ years working with current (i.e. bidding) company.
  - Five (5)+ years working on SaaS product solution for the activities listed in this RFP.
  - Experience using Jira or an alternative Agile project management tool.



# Project Team Desirable Qualifications

1

**Key project staff (below leadership level) are to have the following experience:**

- a. Five (5)+ years' experience working with the health insurance industry.
- b. Two (2)+ years working with current (i.e. bidding) company.
- c. Three (3)+ years working on SAS product solution for the activities listed in this RFP.

2

**Scrum Master is to have the following experience:**

- a. At least three (3) years' full-time equivalent (FTE) experience managing and delivering on at least two (2) Agile software projects or platform(s) that are similar in scope to this RFP.
- b. At least three (3) years' FTE experience managing complex digital projects in an Agile environment.
- c. At least three (3) years' FTE experience serving as a client's direct point of contact.
- d. Shall hold a certification related to Scrum (e.g., Certified ScrumMaster® [CSM] or equivalent).

3

**Implementation Team members are to have the following experience:**

- At least one (1) member of the Implementation Team shall have been involved as the lead Interaction Designer/User Researcher/Usability Tester in two (2) or more projects similar in scope to the Bidder's proposed solution.
- Each member of the Implementation Team shall have been involved in at least one (1) agile software development project.

# Administrative Requirements

- Proposals must include specific attachments, all of which, if requiring a signature, must be signed by an authorized representative. Both photocopies of wet signatures and electronic signatures are acceptable. These attachments are:
  - Proposal Cover Page (Attachment 1)
  - Payee Data Record (STD. 204, Attachment 2)
  - Contractor Certification (Attachment 3)
  - Statement of Economic Interests Certification (Attachment 4)
  - Bidder Declaration (GSPD-05-105, Attachment 5)
  - Proposal Checklist (Attachment 6)
  - GenAI Reporting and Factsheet (STD 1000, Attachment 7)
- Upon contract execution, the proposer agrees to submit a completed Statement of Economic Interests (Form 700) for representatives and applicable staff identified as code filers. Further information can be found on Covered California's Conflict of Interest Code and the Fair Political Practices Commission's website.
- To claim the DVBE incentive, proposers must also include the completed and signed Disabled Veteran Business Enterprise Declarations (STD. 843, Attachment 8), if applicable.



# Required Documents



## Mandatory Insurance Documents

- A Certificate of Liability Insurance equal to or greater than \$1,000,000.00;
- Proof of Workers' Compensation Liability Insurance;
- Proof of Cyber Liability Insurance of not less than \$5,000,000.00 both per occurrence and annual aggregate;
- Proof of Automobile Liability Insurance, including non-owned auto liability, of \$1,000,000.00 per occurrence for persons used by the Contractor for services provided pursuant to this contract; and
- Proof of Professional Liability Insurance.

## Compliance and Exceptions

- If the Proposer cannot include a Certificate of Liability Insurance and/or a Certificate of Automobile Liability Insurance and/or Proof of Professional Liability Insurance with its proposal, it must provide a written explanation detailing why it cannot comply with the requirement(s).
- Covered California may, in its sole discretion, accept a proposal without these Certificates if the Proposer provides a valid justification for the absence of one (1) or more of them and confirms that it will submit the appropriate Certificate(s) prior to contract execution, if it is selected as the Contractor.
- Covered California cannot execute a contract with the selected Contractor without these required Certificates and will award the contract to the next highest-scored Proposer if the Contractor fails to produce the Certificate(s) prior to contract execution.

## Corporate Proposer Requirements

- If the Proposer organization is incorporated, proof of Active status with the California SOS must be provided in one (1) of the following forms:
  - A copy of the Proposer's current Certificate of Status issued by the SOS; or
  - A copy of the Proposer's Entity Detail page from the SOS's Business Search website (<https://bizfileonline.sos.ca.gov/search/business>).

# Response to the Model Contract

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Using the Model Contract Exhibit A – Scope of Work and Exhibit A, Attachments 1 through 5, include a revised Exhibit A – Scope of Work and Attachments with suggested tracked changes in Microsoft® Word®.



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®.



Using the Model Contract Exhibit C – IT General Terms and Conditions provided, include a revised Exhibit C – IT General Terms and Conditions with suggested tracked changes in Microsoft® Word®.



Using the Model Contract Exhibit D – Privacy Addendum and Attachment 1 provided, include a revised Exhibit D – Privacy Addendum and Attachment 1 with suggested tracked changes in Microsoft® Word®.

# Technical Requirements

Understanding and Approach  
(no more than 5 pages)

Corporate Qualifications  
(no more than 4 pages)

Project Team Qualifications  
(no more than 3 pages)  
\*Resume for project team

Past Projects Completed  
(no more than 3 pages)

Project Assumptions  
(no more than 3 page)



<https://hbex.coveredca.com/solicitations/#RFP-2025-09>