



REQUEST FOR OFFER

RFO: 2018-13

For:

Strategic Planning Development and Organizational Training

**On behalf of Covered California
Monday, June 10, 2019**

You are invited to review and respond to this Request for Offer (RFO). To submit an offer for these services, you must comply with the instructions contained in this document as well as the requirements stated in Covered California's Attachment A – Scope of Work and Attachment B – Cost Worksheet. Only active [**California Multiple Award Schedules (CMAS)**] contractors may participate in this solicitation. By submitting an offer, your company agrees to the terms and conditions stated in this RFO and your proposed [**CMAS**] contract.

Read the attached document carefully.

The RFO due date is: **1:00 p.m. PST, Thursday, June 20, 2019**

Responses to this RFO must be submitted via email to the department contact noted below.

Department Contact:

Sheryl Brewer
Covered California
1601 Exposition Blvd.
Sacramento, CA 95815
hbxsolicitation@covered.ca.gov

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General Information

1. Background and Purpose of the RFO:

Strategic Planning Development

Over the past five years, Covered California's leadership team has worked to establish five (5) strategic pillars and more recently three (3) cross cutting initiatives for the organization. These pillars are intended to drive our workforce initiatives and include:

Strategic Plan

- Affordable Plans – consumers purchase and keep Covered California products based on the perception this is a good value for them;
- Needed Care – consumers receive the right care at the right time;
- Effective Outreach and Education – consumers understand what we offer and have positive attitudes about Covered California;
- Positive Consumer Experience – consumers have a positive experience from initial enrollment to keeping their coverage;
- Organizational Excellence – Covered California has the right tools, processes and resources to support our team to deliver our mission

Cross Cutting Initiatives

- Innovation for the long term and being nimble in the present
- Trailblazing and sharing our experience in California and nationally
- Working in partnership with others: DHCS and other public and private entities

Each year division directors create an action plan or set of goals called a “3 + 1” document driven by these strategic priorities. These action plans are shared amongst the team and quarterly to semi-annual check-ins occur to revisit the action plans, the pillars, and initiatives and any changes that have occurred in Covered California's landscape.

Covered California desires to engage with a consultant to assist in the development of a comprehensive strategic plan that includes planning, developing a clear road map, clearly define and establish metrics for monitoring, evaluating and develop improvements to the action plans.

Key goals of this project will include:

- Increased transparency across the organization
- Ability to evaluate whether resource allocation aligns with strategic priorities
- Encourage cross-divisional collaboration by identifying strategic priorities, expectation and evaluating for organizational success
- Increase alignment of organizational work to our strategic pillars and priorities

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- Cost savings due to clear metrics to evaluate and improve upon action steps aimed at accomplishing our strategic initiatives
- Increased staff retention due to transparency and clarity of workload priorities and goals
- Improved consumer journey due to efforts to streamline processes and procedures and improve consumer journey through strategic initiatives

Customized Organizational/Program Analysis and Training

To assist our programs and organization support these strategic goals, at the direction of the Executive Leadership Team, Covered California desires the vendor to work with executive programs, divisions and programs within those divisions to identify areas of opportunity to enhance the program and staff support the goals and initiatives of the organization through customized training. Consulting services and customized training will be limited to the following areas:

- Strategic planning and change management
- Governance and decision-making
- Performance measurement and management
- Leadership and development
- Core process improvement
- Program evaluation

At the direction of Executive staff, the contractor may also perform organizational/program evaluations and/or needs assessment and make training recommendations to executive leadership.

2. Key Dates

It must be understood that time is always of the essence, both for the RFO submittal and contract completion. Offerors are advised of the key dates and times shown below and are expected to adhere to them.

<u>Event</u>	<u>Date</u>
1. Release of RFO	Monday, 06-10-2019
2. Questions Due by	1:00 p.m., Thursday, 06-13-2019
3. Agency Responses to Questions Released by	Monday, 06-17-2019
4. RFO Response Submission Due by	1:00 p.m., Thursday, 06-20-2019
5. Agency Review of RFO Submissions	Week of June 24, 2019

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6. Estimated contract term

August 1, 2019 through July 31, 2021

3. Contract Amount

Response shall not exceed **\$250,000.00** in total costs. Responses that exceed this amount will not be considered for selection.

4. Contract Term

The initial contract term shall be from **August 1, 2019**, through **July 31, 2021**. The contract term may change if the Agency makes an award earlier than expected or if the Agency cannot execute the agreement due to unforeseen delays.

5. Optional Contract Amendment

The Agency may, at its sole discretion, extend the contract term for **one (1)** additional consecutive year(s) if mutually agreed upon by the Agency and the Contractor. The extension will address additional foreseeable business needs resulting from the initial scope of work. In addition, this contract shall be amended to include additional time and/or funding for service(s) in the scope of work at the same rates provided in the Contractor's proposal.

6. RFO Response Requirements

This RFO and the offerors' responses to this document will be prepared on the ordering department's STD 65 or STD 213.

Responses must contain all requested information and data and conform to the format described in this section. It is the offeror's responsibility to provide all necessary information for the Agency to evaluate the response, verify requested information and determine the offerors' ability to perform the tasks and activities defined in the Agency's Attachment A – Scope of Work and Attachment B – Cost Worksheet.

The offerors must submit one (1) copy of their response as a single .pdf file to the department contact name and email address contained on the cover sheet to this RFO.

7. RFO Response Content

The majority of the information required to respond to this RFO is contained in the Agency's Attachment A – Scope of Work and Attachment B – Cost Worksheet.

- a. Understanding and Approach Narrative (no more than 3 pages) addressing the Agency's Attachment A – Scope of Work:

The offeror's Understanding and Approach Narrative responds to the Agency's Scope of Work and will be used to evaluate responsiveness to requirements. This

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Understanding and Approach Narrative must map each task or deliverable item back to Attachments A and B.

The response must include any additional information that the offeror deems necessary to explain how the company intends to meet the Agency's requirements. The Understanding and Approach Narrative needs to contain the following, as appropriate:

1. Overview of the required tasks and outcomes.
 2. Description of how the tasks will be performed.
 3. Work plan for each task, including sub-task description, including due date for each deliverable (not part of the 3-page limit).
 4. Samples of work from other projects, or outlines of what deliverables are proposed for the required tasks.
 5. Organization chart that identifies the proposed contract team (not part of the 3-page limit).
 6. Resumes for each identified member of the contract team, detailing the experience which meets the Agency's requirements (not part of the 3-page limit).
 7. Any other requirements shown in the Agency's Scope of Work. *(Note: If contractor is utilizing a subcontractor, the offer must list the firm name, address, contact person and address. Subcontractors are subject to all the terms, conditions and requirements of this subsequent contract.)*
- b. Corporate Qualifications Narrative (no more than 3 pages): Describe and provide examples of the company's overall organizational capability and resources as they relate to the general requirements set forth in the Scope of Work, including the following:
1. Ability to manage the project and the risks involved with the project.
 2. Ability to complete projects on time and within budget.
 3. Ability to provide quality deliverables.
 4. Evidence of the company's experience performing the services outlined in this solicitation, including the total number of years the company has been providing the services outlined in the Scope of Work.
- c. Team Qualifications Narrative (no more than 3 pages): Describe the qualifications of each of the members of the proposed team. Identify the role that each member is

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expected to play and describe the experience, education, knowledge, and skills each member possesses as it relates to their proposed role.

- d. Completed Projects Narrative (no more than 3 pages): Describe the past projects the company has completed related to the requirements outlined in the Scope of Work. Identify the tools the company proposes to use and the products it will produce as part of this project.
- e. Complete Attachment B – Cost Worksheet.

8. Contract Award

Award of a contract resulting from this RFO will be based on the response that is most highly rated after applying the weighted evaluation criteria described below. 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.

Evidence of extensive previous experience in similar complex, short deadline efforts will receive significant consideration in the evaluation process, as will demonstrated experience related to the Scope of Work. The table below lists the evaluation categories and the weights each will carry in the overall evaluation of each offer:

Criteria	Weight	Points
Understanding and Approach	25%	250
Corporate Qualifications	15%	150
Team Qualifications	20%	200
Completed Projects	10%	100
Cost	30%	300
Totals	100%	1,000

The Evaluation Team will evaluate offerors' proposals in the five areas of requirements:

1. Understanding and Approach
2. Corporate Qualifications
3. Team Qualifications
4. Completed Projects
5. Cost

Understanding and Approach

Scoring of this factor shall be based upon the Evaluation Team's assessment of the offeror's understanding of and insight into the challenges, issues, and risks faced by the Agency as depicted in the Scope of Work, and the feasibility, efficiency, and expected effectiveness of the offeror's approaches to providing assistance to the Agency.

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Evaluators will assign scores based upon information contained in the offeror's Understanding and Approach Narrative. The Evaluation Team will consider, in descending order of importance:

1. Quality of the offeror's approach to addressing scope of responsibilities and activities, including how the offeror will provide the flexibility to address issues as they arise, while maintaining a high level of quality in the approach;
2. Quality of the offeror'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 the project in general.

Corporate Qualifications

The Agency seeks a contractor with significant corporate capacity to respond to the Agency's needs during the entire duration of the contract, the ability to support a high degree of qualified staff continuity, and a consistently high level of individual team member performance.

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 the Scope of Work. Evaluators will assign scores based upon the offeror's Corporate Qualifications Narrative.

Team Qualifications

The Agency seeks a team of highly qualified, senior staff to provide high-level project management support services as depicted in the Scope of Work. The following sections describe the evaluation and scoring of staff qualifications.

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 project 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.

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- d. Relevance of experience as indicated by the Scope of Work and based on subject matter expertise from project experience.
- e. Relevance of education, training, and certifications.

Completed Projects

Scoring of this factor will be based upon the Evaluation Team's assessment of the breadth, depth, and relevance to the Scope of Work requirements, as well as corporate resources and capacity as indicated by the characteristics of projects. Evaluators will assign scores based upon information contained in the Completed Projects Narrative.

Scoring Criteria

Rating	Relation to Requirements	Strengths	Deficiencies	Weaknesses	Likelihood of Success	Score
Excellent	Superior attainment of all requirements	Numerous and significant in key areas	None	Minor, if any	Very High	10
Good	Expected to meet all requirements	Some and significant in key areas	None	Minor, but are far outweighed by strengths	High	7.5
Acceptable	Capable of meeting all requirements	Some in non-key areas	Minor	Minor, but are outweighed by strengths	Fair	5
Marginal	May not be capable of meeting all requirements	None, or some that are outweighed by weaknesses or deficiencies	Significant	Significant	Poor	2.5
Unacceptable	Not likely to meet all requirements	None, or some that are far outweighed by weaknesses or deficiencies	Needs major revision	Needs major revision	None	0

Cost Score

Cost

Each offeror's cost score will be calculated based on the ratio of the lowest cost proposal to the offeror's cost, multiplied by the maximum number of cost points available, as shown in the calculation below:

$$\frac{\text{Lowest Total Cost Bid}}{\text{Offeror Total Cost}} \times \text{Total cost points available}$$

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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

Offeror	Grand Total Cost	Calculation	Cost Points Awarded
A	\$400,000	$\frac{\$300,000}{\$400,000} \times 400$	300
B	\$350,000	$\frac{\$300,000}{\$350,000} \times 400$	344
C	\$300,000	$\frac{\$300,000}{\$300,000} \times 400$	400

Review of Offers for Award

Responses to this RFO will first be reviewed for responsiveness to all the requirements in Attachments A and B, and any other attachments. If a response is missing required information in any attachment, it may be deemed unresponsive.

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ATTACHMENT A – SCOPE OF WORK

A. Scope and Description

Over the past five years, Covered California’s leadership team has worked to establish five (5) strategic pillars and more recently three (3) cross cutting initiatives for the organization. These pillars are intended to drive our workforce initiatives and include:

Strategic Plan

- Affordable Plans – consumers purchase and keep Covered California products based on the perception this is a good value for them;
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Cross Cutting Initiatives

- Innovation for the long term and being nimble in the present
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Each year division directors create an action plan or set of goals called a “3 + 1” document driven by these strategic priorities. These action plans are shared amongst the team and quarterly to semi-annual check-ins occur to revisit the action plans, the pillars, and initiatives and any changes that have occurred in Covered California’s landscape.

Covered California desires to engage with a consultant to assist in the development of a comprehensive strategic plan that includes planning, developing a clear road map, clearly define and establish metrics for monitoring, evaluating and develop improvements to the action plans.

Key goals of this project will include:

- Increased transparency across the organization
- Ability to evaluate whether resource allocation aligns with strategic priorities
- Encourage cross-divisional collaboration by identifying strategic priorities, expectation and evaluating for organizational success
- Increase alignment of organizational work to our strategic pillars and priorities
- Cost savings due to clear metrics to evaluate and improve upon action steps aimed at accomplishing our strategic initiatives

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- Increased staff retention due to transparency and clarity of workload priorities and goals

Customized Organizational/Program Analysis and Training

To assist our programs and organization support these strategic goals, at the direction of the Executive Leadership Team, Covered California desires the vendor to work with executive programs, divisions and programs within those divisions to identify areas of opportunity to enhance the program and staff support the goals and initiatives of the organization through customized training. Consulting services and customized training will be limited to the following areas:

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At the direction of Executive staff may also perform organizational/program evaluations and/or needs assessment and make training recommendations to executive leadership.

B. Contractor Tasks and Responsibilities

- Schedule consultative meetings, workgroups or presentations with affected groups
- Work collaboratively with the Executive Team, Directors, Senior Program leaders and Covered California staff in support of this initiative.
- Conduct interviews with key stakeholders
- Facilitate decision-making sessions
- Assist Divisions with development of their action plans
- Work with the organization, divisions or programs to assess and develop customized training in coordination with Covered California University
- Schedule training sessions working in coordination Covered California University
- Deliver training courses
- Assess training effectiveness through course evaluations
- Create success criteria for training, track success criteria and provide results and recommendations as necessary to achieve the goals of the training

C. Deliverables

- Design a strategic planning process
- Develop a comprehensive strategic plan
- Develop program action plans

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- Develop metrics, measures and methods to track and assess success
- Identify and develop tools, methods or models to assist in assessing overall health of the strategic plan
- Develop a communication plan that ensures employees understand and are aware of the organization's strategic plan, identifies strategic priorities, organizational expectations and how the organization will monitor for success
- Develop and deliver training classes in coordination with Covered California University
- Provide Executive Staff and Covered California University and the program with course evaluations, success measures, and recommendations
- Monthly project reports
- Monthly Executive Summary

Expected deliverable dates

All planning, development, design and activities relating to Covered California's 3 – 5 Year Strategic plan which must be completed not later than December 31, 2019. Development and delivery of training classes will be on-going through the contract term.

D. Acceptance Criteria

[contracts to put in regular language here]

E. Other Reporting Requirements

[remove, no additional requirements]

F. Agency Responsibilities

- Ensure Covered California key identified staff will be available to attend meetings, workshops, facilitated sessions and training sessions as necessary to support this contract.
- Provide vendor conference rooms, training rooms/computer labs for facilitation activities, workshops and training classes.
- Provide vendor a workspace while on-site and access to building resources
- Identify Points of Contact in divisions or programs to assist vendor to support this contract

G. Travel

Travel and overtime rates will not be reimbursed under this contract.

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ATTACHMENT B – COST WORKSHEET

Task	Hours	Rate Per Hour	Extended Total	Name of Employee

Total Costs \$ _____