

**RFP 2024-21: Consumer Research Pool
Q&A**

**RFP 2024-21: Consumer Research Pools
Questions and Answers**

No.	Bidder Questions:	Covered CA - Response:
1.	Can a firm provide a proposal as a Prime for one Service Area (e.g., Service Area 2), while also serving as a subconsultant on a team providing a separate proposal for multiple service areas (e.g., Service Areas 1, 2 and 3)?	Yes, a firm can provide a contract proposal as a prime in a service area while also being subcontractor in other service areas. However, a contractor cannot be the prime and subcontractor for another firm within a single project.
2.	Once firms are selected for the Consumer Research Pool(s), are projects that involve multiple service areas (e.g., Service Area 1 and Service Area 2) subdivided so that firms on the Service Area 1 consumer research pool are given the opportunity to propose for Service Area 1 tasks, while firms on the Service Area 2 consumer research pool are given the opportunity to propose for the quantitative research components? Or, in practice, does Covered CA tend to select firms that are on both consumer research pools (Service Area 1 and Service Area 2) when these types of projects occur?	For projects that involve multiple service areas, Covered California aims to find the best vendor(s) to fill the project needs. This can include one (1) vendor who can perform tasks in multiple service areas, or multiple vendors who can perform tasks in a singular service area, working in collaboration with another vendor to meet overall project goals.
3.	<p>Role of Consumer Research in Strategic Planning</p> <p>How does Covered California envision using the outputs of consumer research in its broader strategy and decision-making? For example, do findings typically inform marketing campaigns, enrollment experience improvements, policy decisions, or other areas?</p>	The Consumer Research Pool will be utilized by multiple divisions within Covered California, and the findings will be applied to continual program improvement across the organization. Consumer research informs message creation, outreach strategies, program implementation approaches, application design, and evaluation of programs and policies so that Covered California can ensure that the organization is quantifying and meeting its goals identified in its strategic plan.

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4.	<p>Equity and Representation Priorities</p> <p>In addition to demographic diversity, are there specific equity-related outcomes or frameworks (e.g., social determinants of health, health equity metrics) that Covered California prioritizes in consumer research?</p>	<p>Covered California prioritizes diversity and representation across a variety of demographics. These priorities may shift based on the nature of the project, expanding from demographic representation to also include representation based on the presence of health-related social needs, standard indices like Healthy Places Index, or utilization of or access to care, as well as the intersection of these factors with each other and demographics.</p>
5.	<p>Research Translation and Storytelling Expectations</p> <p>Does Covered California have preferred formats or forums for sharing research insights (e.g., briefs, executive presentations, video, audio, workshops)? How important is storytelling and visual communication in helping insights land with internal or external audiences?</p>	<p>Deliverable formats may vary by each specific project. However, most projects will require executive presentations that summarize research findings, with versions curated for either internal or external audiences. Visualization of data and findings is critical to Covered California for successful communication of research efforts.</p>
6.	<p>Generative AI and Risk Disclosure (HBEX 707)</p> <p>What specific risks is Covered California most concerned about regarding the use of generative AI in the delivery of consumer research services? How will responses to HBEX 707 be used in the evaluation process or reflected in potential special contract provisions?</p>	<p>The HBEX 707 is used to evaluate if a proposed GenAI tool poses a security, privacy, or ethical risk to Covered California.</p> <p>The HBEX 707 will be reviewed by the Information Technology Division to ensure that any proposed tools are acceptable and meet our security and privacy requirements.</p>
7.	<p>Language and Cultural Access</p> <p>Beyond Spanish, are there specific threshold languages or cultural groups Covered California prioritizes for consumer research? Are there preferred translation vendors proposers should consider for potential subcontracting?</p>	<p>Depending on project needs, Covered California can seek the ability to conduct consumer research in all threshold languages and more. Covered California does not have preferred translation vendors but appreciates vendor flexibility adding additional translation subcontractors as project needs arise.</p>

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8.	<p>Demographic and Cultural Competency Targets</p> <p>Are there specific demographic segments, access needs, or cultural competency expectations that proposers should address in their technical responses?</p>	<p>Covered California seeks a pool of vendors who can identify and speak to a diverse set of consumers in a culturally appropriate manner. Any relevant experience that a bidder has should be included in their technical responses. Common demographics and socioeconomic characteristics of interest include combinations of spoken language preference, race and ethnicity, geographic area, presence of chronic conditions, employment sector, life stages, and education status.</p>
9.	<p>Project Assignment Process</p> <p>How will individual projects be awarded to pool vendors—through mini-competitions, direct selection, or a rotational assignment process?</p>	<p>Please see RFP 2024-21, Section 1.1.2 Purpose:</p> <p>“When a project need arises, one or more contractors within the pool may be asked to prepare a proposal describing: their understanding of the project, their approach to addressing the scope of responsibilities, methodology and approach of how the project would be executed, timeline to execute the project, relevant experience or expertise, staff that would be assigned to the project, and the fee the contractor would charge for completion of the project.</p> <p>Covered California will review all requested work proposals submitted and choose a contractor in the consumer research pool based on required expertise, proposed approach, ability to meet proposed timelines, and cost for the work.”</p> <p>The proposal template that contractors will be asked to complete will look very similar to the finalized work order. The sample work order can be found in Exhibit A, Attachment 1.</p>
10.	<p>Vendor Preferences and Availability</p> <p>Will vendors have the opportunity to express interest or availability for specific projects, or will Covered California assign projects based on internal criteria?</p>	<p>Please see the response to Question 9.</p>

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11.	<p>Service Area Scope and Deliverable Types</p> <p>Can Covered California provide additional detail or examples of the typical types of projects and deliverables expected within each of the three Service Areas?</p>	<p>The Service Areas are intended to maintain flexibility for Covered California to execute a diverse set of projects as organizational research priorities evolve in response to program changes, the federal and state policy landscape, and initiatives identified through the strategic plan. Deliverables will vary by project need, but most will require executive presentations summarizing findings and recommendations for action based on research results.</p> <p>Please see Model Contract – Exhibit A, Section D.</p>
12.	<p>Service Area Selection Strategy</p> <p>Is there any disadvantage or penalty for submitting a proposal for only one Service Area? Conversely, would proposing for multiple Service Areas—while being particularly well-qualified for one—be viewed less favorably?</p>	<p>There is no penalty or advantage for submitting a proposal to one (1) or multiple Service Areas since each Service Area will be scored separately. Bidders are encouraged to submit proposals for all Service Areas for which they may qualify. Please note that contractors will be able to perform work only for the Service Area(s) for which they are approved.</p>
13.	<p>Deliverable Acceptance Criteria</p> <p>Are there established criteria that Covered California uses to accept deliverables, and will these be defined on a per-project basis?</p>	<p>Contract deliverables are approved on a per-project basis. Many projects will define interim deliverables for review ahead of the final deliverable to ensure adequate reviews are built into the work order timeline. However, final deliverable acceptance is at the discretion of the project lead of the work order.</p>
14.	<p>Payment Contingencies and Cancellations</p> <p>In the event that a project is canceled midstream or QHP-related funding is delayed or withdrawn, how does Covered California handle payment for work already completed or costs incurred?</p>	<p>In the event that a project is ended early, Covered California will pay the vendor for costs incurred up to that point. Please refer to Exhibit B for more details.</p>

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15.	<p>In Section 3.1.4, bullet point 1, the RFP notes that "Contractor's staff must be capable of meeting with Covered California's key staff on-site or via video conferencing." However, Exhibit A, Section E – Reporting Headquarters Location, states that "Upon request of the project sponsor, the Contractor must be able to report on site at Covered California."</p> <p>Given this, does Covered California anticipate the contractor being needed on-site or will virtual meetings and availability during Covered California's working hours suffice?</p>	<p>Covered California anticipates that the majority of the work can be done via virtual meetings. In the event that Covered California requires the Contractor to come on-site, the Covered California Representative will inform the Contractor well in advance. Additionally, please review the Model Contract, Exhibit E, regarding Travel Reimbursement allowed under this Contract.</p>
16.	<p>I'd also like to confirm that Contractors located in the U.S., but outside of California, are eligible to participate in the RFP process.</p>	<p>All Contractor's who meet the minimum qualifications may participate in this RFP Process. This includes Contractors who are foreign corporations (i.e. Contractors incorporated in a state besides California) so long as those foreign corporations are in good standing in their home state and will be appropriately registered with the California Secretary of State prior to contract execution. See also the response to question #120.</p> <p>For more specific information, please refer to section 1.1.12 Rejection of Proposals, subsection 6. Corporation in Good Standing of RFP 2024-21.</p>
17.	<p>Does Covered California differentiate between subcontractors and consultants for the purposes of this RFP?</p>	<p>No, there is not a differentiation between subcontractors and consultants for the purposes of this RFP. All subcontractors/consultants should be listed in Attachment 5: Bidder Declaration (GSPD-05-105) along with the corresponding percentage of bid price.</p>
18.	<p>Lastly, regarding section 4.1.14, what percentage of projects do you anticipate will involve PII?</p>	<p>The percentage of projects that will involve PII is dependent on the types of projects that will be needed at that time. However, many projects require outreach to consumers, which will involve PII.</p>

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19.	<p>General</p> <p>Can you describe a typical work order or project that a Contractor would be qualified to bid on under this RFP?</p>	<p>Each project request will fall under one (1) or more of the three (3) Service Areas. Please see Model Contract – Exhibit A for services that a Contractor may be asked to provide. Projects will vary by type (evaluation of existing data, measurement development, consumer testing of outreach materials, survey data collection) as well as by the subject matter (i.e., access and utilization, marketing and outreach, consumer impacts of state or federal policy). Work order requirements will vary by project, but most will require kick-off and alignment on project goals, analysis, reviewing of results with the internal project team, and sharing of results with the executive audience.</p>
20.	<p>Does the Proposer's Questionnaire require a signature?</p>	<p>No, Attachment 10: Proposer's Questionnaire does not require a signature.</p>
21	<p>In the case that no Contract Modification is requested, does Exhibit A - Scope of Work need to be completed or only reviewed by bidders (i.e. - Do we only need to remove the "not applicable" Service Areas from Exhibit A, or are other inputs needed)?</p>	<p>Yes, even if no Contract Modifications are requested, Proposer should still submit Exhibit A, Scope of Work; however, nothing needs to be removed/redlined/inputted.</p>
22	<p>Does Exhibit A Attachment 1 - Work Order need to be completed or just reviewed?</p>	<p>No, Exhibit A Attachment 1 - Work Order just needs to be reviewed and submitted with the other Model Contract Exhibits.</p>
23	<p>Is it permissible for a Bidder to submit Covered California as a reference for the purposes of this RFP?</p>	<p>Yes, Proposers may use Covered California for one (1) of the required three (3) references.</p>
24	<p>Can you confirm that the GenAI Risk Assessment is NOT required for projects using GenAI to develop a non-software product?</p>	<p>Attachment 7: GenAI Risk Assessment needs to be completed, signed, and returned as part of the Proposal Submission. If you are proposing to not use GenAI please check the box indicating and sign the form.</p>

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25	If we indicate now that we will not be producing software for the purposes of the GenAI Risk Assessment, will we be permitted to apply for a contract to produce software once qualified (submitting a new Risk Assessment at that time)?	If a new contract/procurement occurs a new HBEX 707 is required to be submitted
26	Can you provide guidance on what it means for services to “include” any previously unreported GenAI technology? For example, if a Contractor uses GenAI to generate or translate outreach or marketing copy that is later vetted by human reviewers or translators, is that subject to the HBEX 707 requirement?	If GenAI is planned to be used for the contract bidders are required to indicate that on the HBEX 707
27	For the purposes of meeting the threshold number of separate projects required to qualify under quant/qual research: Are there size/scope requirements around the 20 separate qualitative research projects requirement?	No.
28	For the purposes of meeting the threshold number of separate projects required to qualify under quant/qual research: Are there any restrictions on how qualitative research projects are identified/defined or requested? For example, if a Bidder has initiated qualitative research allowable under the terms of a state contract, but that research was not commissioned by the state partner, is it allowable to include?	There are no restrictions based on client type for identification of allowable projects to include in the minimum qualifications. In reviewing corporate qualifications, Covered California has identified settings and sectors of interest, although those are not requirements.
29	For the purposes of meeting the threshold number of separate projects required to qualify under quant/qual research: Is there a timeline within which all projects need to have taken place (e.g., within the last three years)	No, there is no required timeline for when projects must have taken place in order to meet the minimum requirements.

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30	If an organization is qualified under this RFP, is subsequently awarded a contract, and needs to add, reassign, or substitute staff during the term of the contract, what is the expected turnaround time on the request required under paragraph 2.1.2 (1) of the RFP?	Covered California does not have a set turnaround time for reviewing added, reassigned, and/or substituted staff per 2.1.2 (1) of the RFP. Covered California will evaluate each request on a case-by-case basis.
31	What is the expected turnaround time and process for the negotiation of substitute personnel under 2.1.2(2)?	Covered California does not have a set turnaround time for the negotiation of added, reassigned, and/or substituted staff per section 2.1.2(2) of the RFP. Covered California will evaluate each request on a case-by-case basis.
32	Do the provisions of 2.1.2 apply to qualified subcontracted temporary personnel staffing working as part of the project team managed by the Bidder?	The provisions of 2.1.2 would be applicable for any subcontractors who are being utilized to meet any of the minimum qualifications and/or any SB/DVBE subcontractors who are being utilized to participate in the preference/incentive programs.
33	Can you describe a typical team size and composition for the purposes of selecting key staff resumes to include?	There is no set team size, although projects typically require a project director and senior staff, with the number varying based on contract scope. Covered California appreciates reviewing resumes of project directors and senior analysts who are representative of the key staff that Covered California will interact with for project strategy and development, and on the day-to-day project work.
34	At the final column of Table 1 in Exhibit B, Attachment 1, do we need to annualize the fully loaded hourly rate for each amendment year, or report the aggregate if the contract were maximally extended for two additional years?	No, proposers do not need to annualize the fully loaded hourly rate for each optional amendment year. Covered California will just be reviewing the amendment year rates and not an aggregate maximum cost.
35	Are subcontractor fees permissible during optional extensions? If so, should we include them in the reported percentage for entire contract term at table 2 of Exhibit B Attachment 1?	The subcontractor fee would be applicable for optional year extensions; however, it would remain the same fee that was bid for the original term of the contract.

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36	If subcontractor fees for a work order qualified under this RFP end up exceeding the percentage estimate projected at this time, will we be permitted to use project funds to pay the higher percentage?	No, the subcontractor fees may not exceed what the proposer bid in Exhibit B, Attachment 1.
37	Can you define a “fully loaded” rate for the purposes of Exhibit B - Attachment 1?	Per Exhibit B - Attachment 1, fully loaded hourly rates should include indirect costs: fringe, overhead, as well as general and administrative expenses(G&A) and any profits or other fees.
38	Can you please define “hard costs” as they are described in Exhibit B - Attachment 1?	In Exhibit B – Attachment 1, the only hard costs that we will accept markup fees for is subcontractors. This should be taken into account when bidding fully loaded labor rates, which should be inclusive of fees.
39	If a Contractor requires access to PII and agrees to work on quant/qual research projects using hardware and infrastructure provided by the state of California, is it necessary to certify current or future compliance on Attachment 10?	All bidders must attest to current or future compliance for interest in projects necessitating access to PII. All contractors must meet privacy and security requirements as outlined in Exhibit D in accessing PII, as well as requirements for background checks. Access to hardware and software provided by Covered California will be evaluated on a case-by-case basis.
40	How long after the expiration of the Agreement does the requirement to provide an accounting of disclosures survive? Relatedly, how long are we permitted to retain the minimum amount of PII necessary beyond the expiration of the Agreement expressly in order to respond to an accounting request?	Please see Exhibit C, Section D – Audit and Exhibit D, Section D.

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41	Are vendors being asked to respond to sample work order as part of the proposal submission? In 5.1.4, we see that scoring of the Understanding and Approach factor “will be based on the Evaluation Team’s assessment of the Proposer’s understanding of and insight into the challenges, issues, and risks faced by Covered California in Model Contract, Exhibit A.” However, we do not see explicit project specifications to bid on as an example of our costing and methodological approach.	No, Proposers do not have to respond to the sample work order as part of the RFP submission.
42	How frequently does Covered California expect to issue work orders to contractors in the pool, and what is the anticipated size or scope of typical projects for each of the 3 areas?	This will vary and depend on the types of projects that will be needed at that time, especially with multiple Covered California divisions leveraging vendor resources within the pool. Some projects may be short, lower-cost efforts, while others are full-year engagements, limiting the number of projects that may be issued.
43	When a new work order is offered to vendors in the pool, how much lead time will be given to respond with a proposal?	This will vary depending on project timelines, but typically Covered California prefers to give vendors two (2) weeks to respond.
44	What are the detailed criteria Covered California uses to select among pool vendors for individual work orders?	Please see the response to Question 9.
45	In the current inflationary environment, we anticipate needing to make cost of living adjustments (COLAs) during the contracting period. Does Covered California have a recommended approach for addressing this?	Covered California is not allowing any cost of living adjustments (COLAs) during the term of this contract. Proposers should factor those adjustments into their fully loaded rates for the original contract term and the option-year rates.
46	Model Contract- Exhibit B, Attachment 1, Section A.2, Page 1. Can you please provide additional clarification on what defines a “hard cost” as mentioned in Attachment 1?	Please see the response to Question 38.

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47	Model Contract- Exhibit B, Attachment 1, Table 1, Page 1. Can we modify the tables in Exhibit B to show annual rates instead of one set of rates for the entire period of performance?	No.
48	RFP 2024-21: Consumer Research Pool, Section 4.1.9 Corporate/ Organization Qualifications Summary. Are we allowed to describe the same projects across multiple service areas, if they are relevant to each?	Yes.
49	General Could you please clarify whether contractors will receive access to any project-related databases or data sources necessary for completing assigned tasks?	Vendors that meet PII privacy and security requirements will be provided with the relevant and necessary data in order to achieve project goals.

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50	<p>4.1.9 Corporate/Organization Qualifications Summary , Page 25</p> <p><i>3.a.ii "Briefly describe your experience implementing at least three (3) separate research or program evaluation projects (ideally California-based) including research design, sample(s) of interest, methodology used for each research project, and outcomes of interest. Please note what roles and responsibilities were carried out by the project team members proposed for Covered California."</i></p> <p><i>3.a.v "Briefly describe your experience with at least three (3) separate clients (ideally California-based) where you have provided research design, program evaluation, or consumer experience evaluation services, preferably specific to health care and/or government entities."</i></p> <p>Could Covered California provide more detail to help differentiate what is being asked for in 3.a.ii and 3.a.v?</p> <p>What makes them different in terms of the services and skills that Covered California would like to see highlighted?</p> <p>Is Covered California requesting that firms highlight at least 6 different projects or could there be overlap in projects to cover 3.a.ii and 3.a.v?</p>	<p>There can be overlap between the information in item 3.a.ii and item 3.a.v. Item 3.a.ii. asks for details on specific projects, all of which may have been undertaken with a single vendor. However, item 3.a.v asks for details on experience working with three (3) distinct clients. Any or all of these client details may have been associated with projects listed in 3.a.ii. If a vendor would like to highlight multiple projects in working with a single client for 3.a.ii, we ask that the vendor provide short details of work done for three (3) distinct clients for 3.a.v.</p>

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51	<p>4.1.7 Stage 2 - Technical Requirements, Page 24 <i>Proposers must comply with the Technical Requirements in the section below for each Service Area they are proposing to provide and customize their response to the various Service Areas. Proposers only need to complete this section for the Services Areas for which they are proposing to provide.</i></p> <p>Do the page limits listed under Technical Requirements apply PER service area or are there certain limits that apply to the overall proposal? -Understanding and Approach (2) -Corporate/Organization Qualifications Summary (6) -Project Team Qualifications (3) -Project Assumptions (2) -Cost Proposal (none) -Client References (none)</p>	<p>Yes, the page limits are specific to submissions per service area, not the total submission if a bidder responds to multiple service areas.</p>
52	<p>4.1.15 Submission Format Instructions, Page 28 <i>For each Service Area, the Proposer must address the required technical requirements: Understanding and Approach, Project Team Qualifications, Corporate/Organization Qualifications Summary, Cost Proposal, and Client References.</i></p> <p>Does EACH service area require their OWN sections of a) Understanding and Approach, b) Project Team Qualifications, c) Corporate/Organization Qualifications Summary, d) Cost Proposal, and e) Client References? Or are there certain sections that only need to be included once in the entire proposal?</p>	<p>Yes, each Service Area requires their own sections. Some of those documents may overlap or have similarities across multiple service areas. The exception is Client References, which may be submitted as part of the Administrative Requirements. If the Proposer wishes to use different references for each Service Area, then they may provide separate lists of references within each Service Area.</p>

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53	<p>1.1.10 Format of Proposals, Page 8 <i>Proposers must submit a proposal package that contains all required attachments, documents, narrative responses, and Model Contract exhibits.</i></p> <p>Does the submission need to be one single file/document with all attachments, documents, narratives, etc. included?</p>	<p>No, the submission does not need to be one (1) single file/document with all attachments, documents, narratives, etc. included.</p>
54	<p>If additional subcontractors are needed to fulfill certain requirements on future work orders, is it possible to propose them to Covered California and onboard such subcontractors at the work order stage?</p>	<p>Yes; however, the Covered California Contract Representative or Project Organizer reserves the right to review and approve any proposed subcontractors.</p>
55	<p>Can Covered California please clarify the contract type of future work orders? For example, will they be fixed price, time and materials, etc. or do contractors have the ability to propose a contract type when providing future written cost estimate bids with specification details for each requested project per Section 4.1.12?</p>	<p>Following the sample work order template in Exhibit A, Attachment 1, all work orders will be a time and materials work order. Fixed cost work order types will not be allowed.</p>
56	<p>Regarding Exhibit B Attachment 1, can Covered California please confirm if it is possible for contractors to propose fixed price commercial items as part of its cost worksheet to facilitate bids for future work orders (e.g., fixed cost per complete for specific types of surveys)?</p>	<p>No, the cost worksheet should include fully loaded hourly rates and subcontractor fees. Please see the response to Question 55.</p>
57	<p>Page 18 – 3.1.4 Project Assumptions and Constraints It appears that travel will be a cost-reimbursable expense. Could you please confirm whether travel costs will be addressed separately under each individual Work Order and therefore should not be included in the RFP's cost worksheet?</p>	<p>Yes, travel costs will be addressed separately under each individual Work Order and should not be included in the RFP's cost worksheet.</p>

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58	<p>Page 22 – 4.1.4 Required Documents Certificate of Insurance: Will Covered California need to be listed as an additional insured? If so, could you please provide the mailing address for the certificate holder?</p>	<p>Yes, per Exhibit C, Section EE. Insurance Requirements of the Model Contract:</p> <p>“Covered California shall be listed as an additional insured on all subcontractors’ or vendors’ Certificates(s) of Insurance. The Contractor shall maintain certificates of insurance for all its subcontractors/vendors”</p> <p>The address should be: Covered California 1601 Exposition Blvd., Sacramento, CA 95815</p>
59	<p>Page 32 – 5.1.7 Cost proposal The RFP states "proposer's will list all proposed staff for that category, along with a description of that personnel's duties, the proposed fully loaded hourly rate for Original Contract Term, and the fully loaded hourly rate for the optional amendment years." Are proposers allowed to submit rates for the four labor categories identified by job title instead of individual staff names/rates? Are there minimum requirements for each Classification labor category that would help determine appropriate personnel classification?</p>	<p>Yes, proposers should provide job titles under each of the categories. We understand each organization is structured differently and expect proposers should use their discretion on how to determine the appropriate personnel classification. Each of the four (4) categories may include various job titles, depending on the organization structure of the bidder. Individual staff names are not required when submitting rates and we encourage vendors to use job titles instead. Categories can be left blank if proposers do not have titles that fall under those categories.</p>
60	<p>Page 35 - 5.1.7 Cost Proposal The RFP states, "Proposers are then given up to 6 additional points for their Subcontractor Markup Fee, found in Exhibit B, Attachment 1, Table 2: Fees." If the proposer is not including subcontractors, does that negatively affect the proposal scoring/evaluation?</p>	<p>No, the scores will be weighted so that this will not negatively affect the scoring. If the proposer does not have subcontractors, but is willing to work with subcontractors to achieve project goals, please list the markup fee. If the proposer will not work with subcontractors, please list N/A.</p>
61	<p>Can graphics and exhibits use a smaller font than the 12-point sized font used in the body of the proposal?</p>	<p>No, per RFP 2024-21, Section 1.1.10 Format of Proposals, Subsection 2.b.1:</p> <p>1) Use a Times New Roman, Arial, or Calibri font of at least 12-point size throughout unless a form is required by Covered California that contains a smaller font.</p>

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62	Can we add additional categories for staff positions beyond the four listed in the RFP in the cost proposal?	No, all staff positions should be contained in one of the four (4) categories listed in Exhibit B, Attachment 1. We encourage vendors to list specific job titles within each of the categories listed, organizing as within the categories most appropriate to the job function. Please see the response to Question 59.
63	Section 4.1.10 - Although the Proposer will make best efforts to consistently staff the same core team on Covered California projects, this will be dependent upon the timing of CC's projects and the team members capacity at the time. Can additional team members be added as-needed to supplement core team members on a given project?	Any additional team members must be pre-approved by Covered California in accordance with RFP 2024-21, Section 2.1.2 Reassignment of Personnel. If Covered California approves the added team members, then they will be compensated at the same proposed rates as the other personnel in Exhibit B, Attachment 1.
64	Section 4.1.12 – As this RFP is not specifically tied to a given project, is the “Initial Cost Proposal Score” only relevant for subsequent Work Orders? How will Exhibit B (Attachment 1 – Cost Worksheet) be used in evaluating / selecting Proposers for the Research Resource Pool?	Exhibit B, Attachment 1 – Cost Worksheet will be used to calculate the Initial Cost Proposal Score which is part of the Total Cost Proposal Score. Per Section 5.1.3 Evaluation Categories and Criteria, the cost worksheet makes up 30 points of the scoring criteria for this RFP. The rates and fees on the cost worksheet will be applied to future Work Orders. The total cost in future project proposals will be considered when selecting vendors for specific project.
65	Section 5.1.7 - Can you please advise how you define the scope of responsibilities for the different positions (Executive Staff, Senior Staff, Staff, Administrative Staff)?	Please see the response to Question 59.
66	Do we need to provide Project Assumptions for each Service Area? Or is a general list acceptable?	A general list of Project Assumptions across all Service Areas is acceptable.

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67	For each service area should we include an individual section on the following: Understanding and Approach, Project Team Qualifications, Corporate/Organization Qualifications Summary, Cost Proposal, and Client References?	Please see the response to Question 52.
68	Is the 3-page limit for Project Team Qualifications per service area?	Please see the response to Question 51.
69	Is the 2-page limit for Understanding and Approach per service area?	Please see the response to Question 51.
70	Do we need to include proof or demonstrate our ability to meet the minimum requirements for each service area? If so, which section should this be included in our response?	Under Section 4.1.9 Corporate/Organization Qualifications Summary: “Proposer must include a summary of relevant background information to demonstrate that they meet the minimum qualifications certified in the Attachment 9 – Proposer’s Minimum Qualifications Certification, including years of experience.”
71	What, if any, of the attachments are required by subcontractors as well as the prime?	Prime Contractor must list all subcontractors on Attachment 5: Bidder Declaration (GSPD-05-105).
72	How many research projects does Covered California anticipate issuing per year under this agreement?	Please see the response to Question 42.
73	What is the average length of time for one research project?	Please see the response to Question 42.

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No.	Bidder Questions:	Covered CA - Response:
74	Is there a budget range or ceiling for typical projects within each service area?	Each project will have its own budget, and the cost will vary by project length and scope. While the cost is not limited by service area, the cost of all projects within the pool cannot exceed the maximum amount payable listed in Exhibit B across all years of the contract.
75	Can you clarify what constitutes “use” of GenAI in the context of this RFP (e.g., internal tools for summarization vs. client-facing outputs)?	Any GenAI tools that would be used to process any Covered California data or processes would constitute use of GenAI
76	Will Covered California publish a scoring rubric or provide more detail on how qualitative criteria (e.g., “Understanding and Approach”) will be weighted within each Service Area?	Section 5.1.3 Evaluation Categories and Criteria – contains the scoring criteria. Additional detail can be found under Sections 5.1.4 – Understanding and Approach, 5.1.5 – Corporate/Organization Qualifications Summary, 5.1.6 – Project Team Qualifications, and 5.1.7 – Cost Proposal. Each Service Area will be scored separately.
77	Are the page limits (e.g., 6 pages for Corporate Qualifications) inclusive of charts, tables, and graphics?	Yes.
78	Section 4, RFP For the Project Team Qualifications, is the 3-page limit inclusive of all service areas, or per service area?	Please see the response to Question 51.
79	Can offerors add subcontractors after award?	Yes. Any additional subcontractors must be pre-approved by Covered California in accordance with RFP 2024-21, Section 2.1.2 Reassignment of Personnel.
80	Section 4, RFP We understand that proposers need to provide separate Corporate/Organization Qualifications Summaries for each Service Area that they are proposing. Can Covered California confirm if the other Technical requirements sections i.e. Understanding and Approach, Project Team Qualifications, Project Assumptions and Client References must also be submitted separately for each Service Area?	Please see the response to Question 52.

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No.	Bidder Questions:	Covered CA - Response:
81	Section 4, RFP Can Covered California confirm whether Project Assumptions is a required component of the Technical Requirements, or whether it is only required if the proposer is making specific assumptions?	No, Project Assumptions would only be required if the proposer is making specific assumptions.
82	Attachment 9, minimum qualifications For Service Area 1, can Covered California clarify if the requirement to have at least three (3) separate clients could be interpreted as having at least three (3) separate clients/projects/contracts within the same government agency (e.g., CMS)?	Yes, separate clients within the same government agency are acceptable.
83	Attachment 9, minimum qualifications For Service Area 3, can Covered California clarify if the requirement to have at least twenty (20) separate qualitative research projects could include separate projects within a single contract (e.g., surveys and interviews, or separate surveys of different entities within a single contract)?	The requirement for 20 separate qualitative research projects can be met by separate projects within a single contract if the instrument and population for each project is distinct. For example, a single survey given to two (2) separate populations cannot be counted as two (2) projects; however, two (2) surveys given to two (2) separate populations may be, even if both surveys are conducted as part of the same contract.
84	Attachment 9, minimum qualifications For Service Area 3, can Covered California clarify if the twenty (20) required qualitative research projects may include projects led by either the prime proposer or the proposed subcontractor?	The 20 qualitative research projects may include projects led by the proposed subcontractor or the prime contractor.
85	Attachment 8, Client References The Client References File only asks for three (3) clients. Are offerors allowed to provide more than 3 references?	Attachment 8 - Client References should only contain three (3) references and can be applied to all Service Areas. However, bidders may choose to submit a separate list of references for each Service Area if they choose to.

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No.	Bidder Questions:	Covered CA - Response:
86	Attachment 8, Client References We assume that the three (3) references can be for all Services Areas (vs. 3 references for each Service Area). Can you confirm this assumption?	Yes, the same references can apply to all Service Areas.
87	Section 4, RFP Can Covered California confirm whether submitting an Updated Model Contract with Exhibits is necessary even if there are no modifications or alterations to the Model Contract?	Please see the response to Question 21.
87	Section 4, RFP Can Covered California confirm whether Client References and the Proposer's Questionnaire should be submitted as part of the Administrative Requirements or the Technical Requirements? They are currently listed under both sets of requirements.	Covered California does not have a preference as long as they are submitted. Please see the response to Question 52.
88	Exhibit B, Attachment 1 We assume that there can be multiple staff in each labor category in the column labeled "Position". For example, we have several types of staff in the "Staff" category, with different position titles and different fully loaded rates. Can Covered California confirm this assumption?	Yes.
89	Exhibit B, Attachment 1 Please confirm if subcontractors are expected to complete a separate Exhibit B Attachment 1 form, or is the intent that the prime contractor will have a fully loaded rate for subcontractors?	Subcontractors are not expected to complete Exhibit B, Attachment 1. The prime contractor can choose to list a subcontractor with fully loaded rates either as part of their staff or list the subcontractor fee.
90	Exhibit B, Attachment 1 Will it be acceptable to include rates by year, since the contract period of performance is 2 years and 8 months, with possible amendment years?	No, please provide rates for the original contract term and then rates for the option years.

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No.	Bidder Questions:	Covered CA - Response:
91	Exhibit A, Attachment 1, Work Order When responding to a request for a work order, can Covered California elaborate on the expected level of detail and page length for the 'Scope of Work' and 'Methodology' sections?	There is no required or recommended length in response to work order requests, and the amount of detail will vary depending on scope of the project. While Work Orders vary in length, these sections are generally at least two (2) pages when using the format of our Work Order template.
92	Exhibit A, Attachment 1, Work Order Will each work order that is awarded and negotiated be a Time and Materials work order?	Please see the response to Question 55.
93	Can you confirm whether work must be performed in-person and/or in-state, or if remote work is acceptable?	Please see the response to Question 15.
94	Looking at the previous (2021) Notice of Intent to Award, we see that there were many more Service Areas for this opportunity in the past. Why has the current opportunity been limited?	After reviewing the Service Areas from the previous iteration of the contract, Covered California consolidated the Service Areas to reduce the administrative burden to potential bidders. While the number of Service Areas has been reduced, the scope of work within the Service Areas has been expanded to allow for more project types than the previous iteration of the Consumer Research Pool.
95	Can you share any reports that have been created from the work done by the current consumer research pool?	Not all work conducted through the current consumer research pool has been made available publicly. However, examples of some projects include: <ul style="list-style-type: none"> • Survey of Uninsured Californians (beginning on Slide 24) • Covered California's Annual Member Survey • Announcement of the evaluation of the Population Health Investments.
96	Do you require both a cover letter and the Attachment 1 cover page, or is the Attachment 1 cover page able to stand alone?	Proposers are only required to submit a complete Attachment 1 cover page.

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No.	Bidder Questions:	Covered CA - Response:
97	Is there any incentive or preference for microbusiness participation (whether as Prime or subcontractors), or is this equivalent to the small business scoring incentive?	If the Microbusiness is certified with the Department of General Services (DGS), then the proposer would be awarded the same preference/incentive participation points as a DGS-certified small business would.
98	Page 20 of the RFP states “If the Proposer wishes to claim the DVBE incentive and/or the SB preference (see Section 6, Preference and Incentive Programs),” then Attachment 11 needs to be filled out. However, it appears that Attachment 11 is only for DVBE participation. If we wish to claim SB preference, is there a separate form we are meant to fill out and submit?	To claim SB preference, a Proposer should submit proof of being a DGS-certified small business and Covered California will apply applicable preference points.
99	Can you define what you categorize as a subcontractor? If we were to purchase a list of respondents for an individual project, would the company we purchase that list from be considered a subcontractor?	<p>Purchasing is not considered a subcontractor cost unless the subcontractor is actively involved in the project. For example, a purchase list is not considered a hard cost, but active work with a recruitment firm would be considered a subcontractor cost. For example, the purchase of a list alone is not considered a subcontractor cost, but a direct or hard cost. However, if there is active work with a recruitment firm, then acquiring the list may be considered a subcontractor cost.</p> <p>Costs to acquire purchase lists should be considered when bidding fully loaded labor rates. Since no additional fees on hard costs will be allowed, please take that into account when bidding fully loaded hourly rates which should be inclusive of fringe, overhead, as well as general and administrative expenses (G&A) and any profits or other fees. Please see the response to Question 38.</p>
100	Can we use repeat references in different service areas if a project covers multiple service areas?	Yes.

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No.	Bidder Questions:	Covered CA - Response:
101	In Exhibit B, Cost Worksheet Table 2: fees are intended for hard costs, but only subcontractors are listed. Should we list all other possible ODCs [such as mailings, incentives, etc.] or will those be included in each work order? Also, if we work with subcontractors who don't bill on a fee basis but per hour, should we include them in table A with their hourly rate?	Other direct costs do not need to be included in the cost worksheet because they will be included in each work order. The only hard costs that we will accept markup fees for is subcontractors. This should be taken into account when bidding fully loaded labor rates, which should be inclusive of fees. The contractor can choose to list a subcontractor with fully loaded rates as part of their staff or list the subcontractor fee. Please see the responses to Question 38, Question 89, and Question 99.
102	DVBE subcontractors: do they need to be in CA and/or registered with GDS to get the incentive amount?	In order to claim the 5% scoring preference available to DVBE Proposers, the DVBE must be registered with the Department of General Services (see RFP 2024-21 section 6.1.3 Disabled Veteran Business Enterprise).
103	Do the corporate references (Attachment 8) need to be included in the narrative (4.1.9] or can we list different projects in the narrative and corporate references?	References are not required to be included in the narrative. Different projects and clients may be listed in the narrative than are provided as client references.
104	How many vendors does Covered California anticipate selecting per Service Area? Will all vendors in a Service Area be notified and invited for each project opportunity, or only a subset?	We will select as many vendors as qualified and do not have a limit on the number of vendors we are selecting per Service Area. Covered California will request project proposals from one or more vendors in the relevant Service Area(s).
105	What level of language and cultural adaptation is expected for non-English deliverables or research instruments?	If translations are required for project review, the vendor, or a subcontractor, is expected to provide full translation capabilities, and ensure that translations use culturally appropriate language. As needed, translations should be cross-referenced against Covered California translations for language consistency.

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No.	Bidder Questions:	Covered CA - Response:
106	How will Covered California support access to internal data, consumer lists, or existing research (especially for quantitative sampling or segmentation work)?	Covered California and the contractor will determine the minimum necessary information needed for a given project and provide resources directly to the contractor on a project-by-project basis. Access to consumer lists is conditional on contractor compliance with Exhibit D and Exhibit D, Attachment 1. Covered California will collaborate with a vendor to ensure they have the adequate background and context from prior research to succeed in the current project goals.
107	For Attachment 7 (GenAI Risk Assessment), what thresholds or frameworks will be used to determine acceptable risk? Are there restrictions on the use of GenAI for data synthesis, analysis, or report generation post-data collection?	Covered California uses our internal security and privacy policy and NIST AI 600-1. We are unable to answer about any restrictions without knowing more details about what type of data will be used and how it will be processed.
108	Attachment 1 (Proposal Cover Page) includes a field for a dollar amount for the cost proposal, however Exhibit B Attachment 1(Cost Worksheet) only requests fully-loaded rates. Is there a specific scope of work that proposers are expected to price using the fully-loaded rates - or how should proposers best fill in dollar amount field for the cost proposal?	[In Attachment 1, you may say “Please refer to Exhibit B, Attachment 1” No need to fill in a total cost.]
109	For Exhibit B Attachment 1(Cost Worksheet): For roles that may vary slightly in rate (e.g., junior vs. senior analyst), should proposers submit an average, a range, or separate line items for each level within the classification?	Please submit each title as a separate line item.
110	For Exhibit B Attachment 1(Cost Worksheet): Does the “Subcontractor” fee in Table 2 apply only to labor or also to subcontractor-sourced hard costs (e.g., incentives, translations, transcription)?	Please see the response to Question 99.

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No.	Bidder Questions:	Covered CA - Response:
111	For Exhibit B Attachment 1(Cost Worksheet): Should out-of-pocket costs that are not subcontractor-driven (e.g., software licenses, participant incentives, printing) be excluded from the cost worksheet?	Yes, please see the response to Question 101.
112	For Exhibit B Attachment 1(Cost Worksheet): Should proposers submit a separate worksheet for each Service Area we're proposing for, or can we submit a combined version with each area labeled clearly?	Please submit a cost worksheet for each Service Area.
113	May project team members be contracted individuals or must they be full time employees of the company?	Yes, subcontractors can be part of the project team.
114	How might we account for subcontractors in this proposal? For example, our company can provide in language services beyond English and Spanish (Vietnamese, Korean, etc.) by subcontracting for those specific services.	All subcontractors should be listed in Attachment 5: Bidder Declaration (GSPD-05-105) along with the corresponding percentage of bid price.
115	When awarded the right to be on the research pool, and once a specific project / SOW is awarded, will there be any additional requirements not currently listed in the RFP? For example, the need for submission of time sheets.	<p>The only additional requirement would be related to whether or not Personally Identifiable Information (PII) is part of the project. If PII is part of the project, then Exhibit D, Exhibit D: Attachment 1, and Exhibit D: Attachment 2 would all be applicable and contractor would need to comply with those requirements. Additionally, all project team members must undergo background checks before data may be shared.</p> <p>While we wouldn't need timesheets specifically, the numbers of hours worked will be needed as part of the supporting invoice documentation.</p>
116	What are the payment terms for invoicing upon completion of deliverables?	The payment terms can be found in RFP 2024-21, Model Contract, Exhibit B.

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No.	Bidder Questions:	Covered CA - Response:
117	Can Covered California provide examples of past or anticipated work order topics across the three service areas to help us better understand expectations?	Please see the responses to Question 11 and Question 95.
118	Will contractors be expected to lead end-to-end research projects (design through dissemination), or will Covered California sometimes provide pre-defined protocols or tools?	Covered California will sometimes provide pre-defined protocols or tools. However, contractors should be qualified and able to lead end-to-end research projects. The scope of a project will be defined in the future project proposal request.
119	How frequently does Covered California anticipate issuing work orders, and will there be any minimum or maximum allocation expectations across the pool of contractors?	Covered California issues work orders based on organizational need and does not anticipate a specific frequency. There is no minimum or maximum allocation expectation across the Consumer Research Pool contractors. Please see response to Question 42.
120	If an out-of-state firm is not currently registered with the California Secretary of State, can registration occur after award but before contract execution?	Yes, Proposer must submit proof of being in Good Standing in their home state. If awarded the Contract, however, Proposer must be registered with the State of California prior to contract execution and must indicate in their submission that they will register with CA SOS after the NOI is posted.
121	Will proposals be evaluated separately for each service area (e.g., qualitative vs. quantitative), or holistically if applying for multiple areas?	Proposals will be evaluated separately for each service area.
122	How will Covered California weigh past performance with California-based populations versus national or multi-state experience?	Covered California will consider past performance with California-based populations more relevant for purposes of this RFP than performance with national or multi-state projects. However, California-based project examples should still meet the articulated requirements.

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No.	Bidder Questions:	Covered CA - Response:
123	Can Covered California clarify the work order issuance process? For example, will all pool contractors be invited to bid on each task, or will assignments be made directly based on fit, capacity, or past performance?	Please see the responses to Question 9 and Question 104.
124	Does Covered California anticipate setting a minimum or maximum dollar amount per individual award within the Consumer Research Pool?	Please see the response to Question 74.
125	What are the top priority research themes Covered California anticipates over the next 12–18 months?	Covered California focus projects on our 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.” The goal of the Consumer Research Pool is to enhance Covered California’s critical efforts to better target and engage with potential consumers, learn about members’ preferences and needs, improve the consumer experience, manage customer satisfaction, increase brand health, and promote services to meet acquisition, retention, and population health goals.
126	Can proposers apply for only one service area, or can proposers apply to all three?	Please see the response to Question 12.
127	How does Covered California evaluate cost competitiveness across different staffing levels if multiple rates fall within the same pricing tier?	Please see Section 5.1.7 Cost Proposal: “For evaluation purposes, Covered California will then take the average of all the proposed rates in each of the categories, review those rates against the ranges in the table below, and award the points based on where in the range the rates are.”

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No.	Bidder Questions:	Covered CA - Response:
128	Is there flexibility to include new staff categories or revise rates in future years if the contract is extended?	<p>No, there is not flexibility to include new staff categories is the Contract. Please see answer to Question 62.</p> <p>Proposers should provide option-year rates in Exhibit B, Attachment 1 at the time of proposal submission.</p>
129	Will there be an opportunity to update or amend our proposal for additional service areas in the future once awarded?	No.