



**Program Evaluation & Tracking
Request for Proposals (RFP) 2017-20
Proposers' Conference**

August 30, 2017

Welcome to



Overview of Agenda

Welcome & Covered California Overview

Colleen Stevens
Director of Marketing

Scope of Work Overview

Ray Jacobs
Research Program Specialist

Request for Proposal (RFP) Overview

Ray Jacobs

Research Assignments Overview

Ray Jacobs

Cost Proposal Overview

Colleen Stevens

Reminders

Ray Jacobs

Questions Received

Colleen Stevens,
Ray Jacobs

Q&A Session *(please save your questions until the end)*

COVERED CALIFORNIA OVERVIEW

About Us

- California's health insurance marketplace for individuals and small businesses established under the Patient Protection and Affordable Care Act (ACA).
- Established in 2010. First state to commit to ACA.
- Primary partnership: the California Department of Health Care Services (Medi-Cal). Also partner with CA Dept. of Insurance, and Dept. of Managed Health Care.
- An independent part of the state government overseen by a five-member board appointed by the governor and the Legislature.
- Both Republican and Democratic governors have been involved in Covered CA's implementation.
- 1.4 million exchange members and over a 4 million increase in Medi-Cal (Medicaid) enrollments.
- Uninsured rate went from 17.2% to 7.1% and Covered CA experiencing a strong risk mix.

Our Vision and Mission

Vision

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

Mission

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.

Strategic Pillars: What We Do

Affordable Plans

Consumers purchase and keep Covered California products based on their perception that this is a good value for them.

Research

Needed Care

Consumers receive the right care at the right time.

Effective Outreach & Education

Consumers understand what we offer and have a positive attitude about Covered California.

Research

Positive Consumer Experience

Consumers have a positive experience from initial enrollment to keeping their coverage.

Research

Organizational Excellence

Covered California has the right tools, processes, and resources to support its team to deliver on its mission.

Research

What We Have

- Budget: \$2.5 million for FY17/18

Deliverable (Project Area)	Allocation
Awareness Tracker	\$500K
Ad Tracker	\$500K
Member Survey	\$400K
TA & Other Potential Projects	\$1.1 M

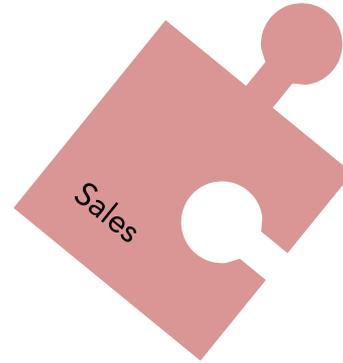
Why This RFP?

- Young organization
- Move from start up to a comprehensive strategic quantitative research and evaluation approach
- We need a research partner to:
 - Work collaboratively with us
 - Review what we have done before
 - Make recommendations on how to improve our approach
 - Bring best practices
 - Plan, design, and implement surveys on a timely basis
 - Provide actionable data
 - Help us improve our consumer journey
 - Help us share our learnings

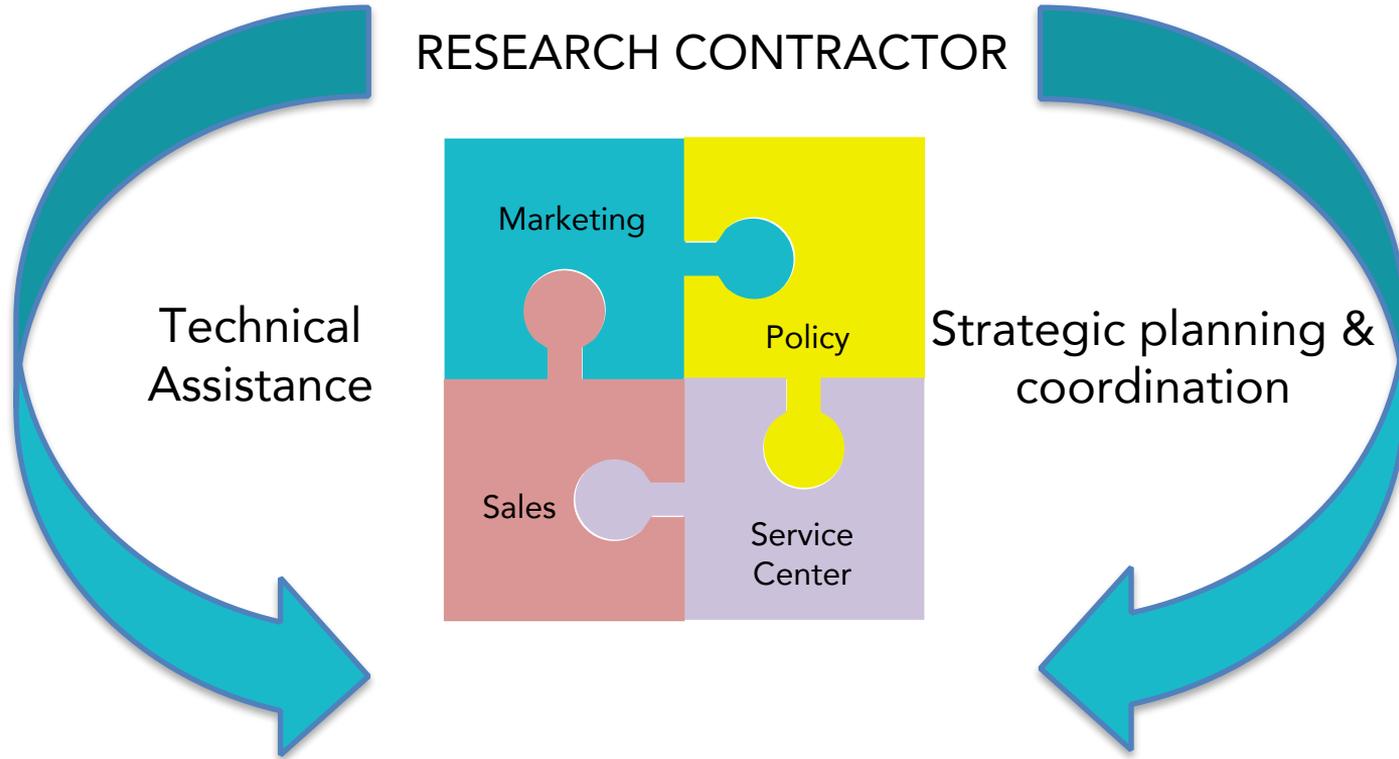
In Developing RFP:

- Known immediate needs:
 - Awareness and ad trackers
 - Member survey
- Unknown:
 - What's missing?
 - Short and long term needs
 - Areas where we have good detail vs. areas where we need your help

An Evolving Research Capability



Coming Together



Strategic Research Partnership



and



Tree
(Conduct
Member Survey)

Forest
(Provide guidance on
strategic research approach)

SCOPE OF WORK OVERVIEW

Scope of Work (SOW)

- The SOW becomes part of the resulting contract (Exhibit A).
- Flexible to address present and potential research needs with the possibility of more than one contract.
- Spending, projects and activities confirmed by detailed estimates and signed work orders.

SOW Sections/Project Areas 1-3*

1. Consumer Tracking Study of Brand Awareness, Attitudes and Knowledge
2. Consumer Tracking Study of Advertising Effectiveness
3. Covered California Member Survey

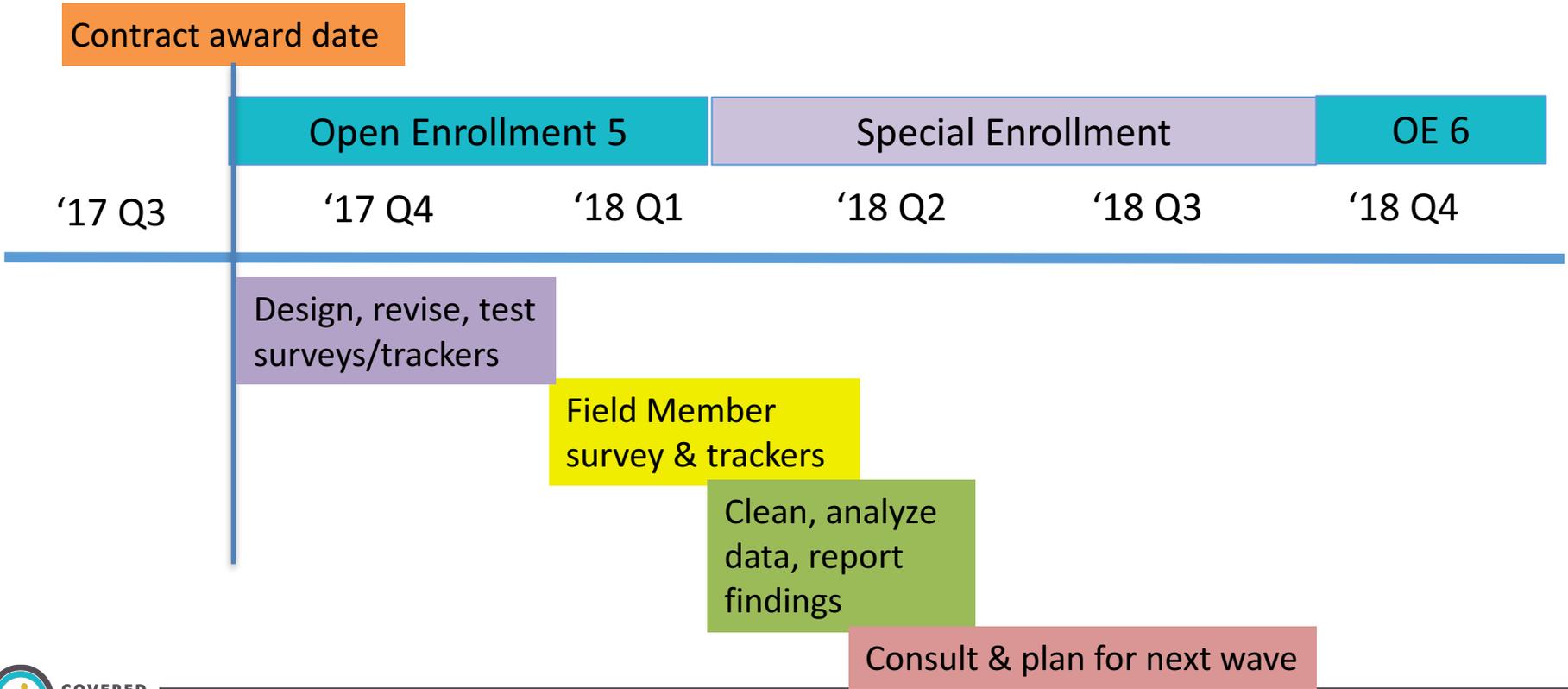
*Requirements common to all Project Areas (SOW, Section C)

SOW - Project Area 4

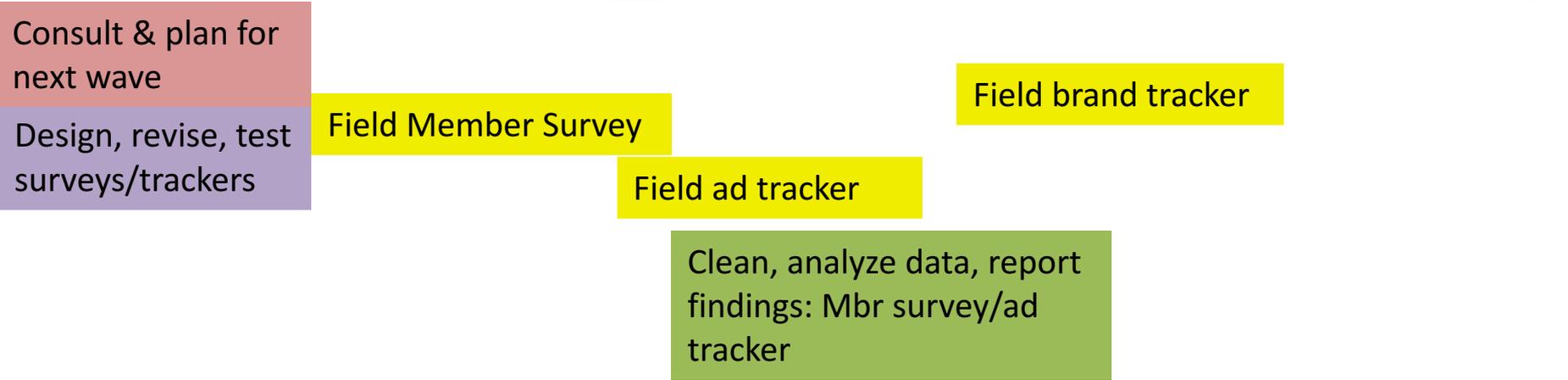
Technical Assistance: Project Management, Research Planning and Additional Surveys and Other Services

- Services/deliverables not fully defined
 - Technical assistance with consumer experience surveys
 - Strategic research planning & coordination
 - Additional studies
- Potential deliverables
 - Phone IVR surveys
 - Econometric modeling

Timeline (2017/18)



Timeline - Future Years (example)



RFP OVERVIEW

RFP Key Elements

- Open procurement
- Best value award
- One or more contracts may result from the RFP (*but one preferred*)
- RFP updates/addenda: check website at <http://hbex.coveredca.com/solicitations/>
- Written RFP/addenda override verbal comments

Contract Funding & Length

- Up to \$2.5M available annually*
- Contract length is 3 years*
 - (Nov. 1, 2017 – Oct. 31, 2020)
 - Two one-year extensions possible

**subject to Board approval*

Key RFP Dates

- Stage 1 Proposals Due **September 15 at 3 P.M.**
- Stage 2 Proposals Due **October 6 at 3 P.M.**
- Stage 2 Presentations **October 10-12**
- Notice of Intent to Award **Week of October 16**
- Projected Contract Start Date **November 1**

All dates subject to change.

Minimum Qualifications - Highlights

- 5 or more years of research experience
- 20 or more U.S.- based employees
- At least \$5M U.S. gross annual revenue performing research services
- At least 3 years experience in one or more of the four project areas (preferably all areas)

Project Lead Expectations

- 5+ years of experience managing tracking studies or quantitative research
- Oversee all SOW activities, regardless if conducted by Contractor or subcontractor
- Present strategic guidance on research approach to Covered California leadership, as needed
- Revised: must be available to be on-site within 24 hours and on regular basis for first 3-6 months of contract

Contractors: Primary and Sub

- Goal/vision: one prime contractor with subcontractors as needed to execute all project areas in the Scope of Work (SOW).
- There are several combinations possible to achieve “full service”
- **Identify subcontractors in your RFP response.**

Stage 1 Submissions and Scoring Highlights

Pass/fail

- Administrative forms (Attachments 1 – 6)

Scored

- Fact Sheet ([Attachment 7](#))
- Proposed Staffing Chart ([Attachment 8](#)) and Resumes
- Proposer's Minimum Qualifications (Narrative)
- Key Subcontractor's Capabilities and Experience (Narrative)
- Addressing Covered California's Research Needs (Narrative)

Proposers receiving minimum of “Meets” will advance; “Meets with Exceptions” may advance at sole discretion of Covered California.

Stage 2 Submissions

Pass/fail

- Administrative forms (Attachments 14-15), and requested insurance documents.

Scored

- Research Assignments (Attachment 10)
- Cost Proposals ([Attachment 12](#))
- Presentation
- Client References (Attachment 13)

Note: per addendum #1, requirement to disclose DVBE and/or SB participation is no longer required for this RFP.

Submission Details

For each stage of submission:

- 1 hard copy marked “MASTER”
- 6 hard copies
- 1 digital copy on a CD of all requested materials
USB sticks, email, etc. not permitted

Formatting and binding:

- Bind or staple response hard copies – no need for expensive bindings, etc.
- Digital copy in searchable text format
- Minimum 12 point Arial or Calibri font, 1.5 line spacing
(Be sure to adhere to page limitations)

Award of Contract

- Notice of Intent to Award
 - Post on solicitation website and at the entrance to Covered California for 5 days prior to protest deadline.
 - All Stage 2 finalists notified week of October 16.
- Protest period
 - 5 day protest period after Notice of Intent to Award.
- Estimated contract start date is November 1, 2017.

Privacy and Data Security

Some research will involve Covered California member data

- Member Survey
- Other consumer surveys

Privacy is addressed in Exhibit D

RESEARCH ASSIGNMENTS & COST PROPOSAL OVERVIEW

Research Assignments

Assignment covers three defined project areas:

1. Awareness/Attitude Tracker
2. Advertising Tracker
3. Member survey

Five-page narrative (per assignment) includes:

- General research plan with timeline
- Description and explanation of methodology
- Assumptions

The Assignments will also be the basis for the Stage 2 presentations.

Cost Proposal

- Will be used in part to determine best value.
- Instructions for Attachment 12 are correct.
- Exhibit B, Attachment 1: **Cost worksheet will be amended.**
- Don't assume reviewer will know the intricacies of your work. Be as clear as possible what the costs are, and how and when they will be applied.

Cost Proposal Project Areas 1 & 2 - Consumer Tracking Survey & Ad Tracker

- Cost per survey completed and what other needed costs to complete survey assignments.
- Use budgets provided for each assignment in responding to the RFP. As part of work order negotiations may increase or decrease budget amount based on changing needs.
- As part of justification, include milestones or phases of a project that upon completion and specific deliverable you would expect payment.
- 2 pages detailed budget justification. Should detail all costs beyond survey completion and any economies of scale that may be applied. Hourly rate may be used if needed. Also, include any cost variation based on methodology used.

Cost Proposal Project Area 3 – Member Survey

- Data needs to be presented two ways:
 - Implemented by Covered California or
 - Implemented by vendor
- Ideally, we want survey implemented by vendor but approval to do so may be delayed due to privacy issues so may have to implement it using Covered California staff. If so, how would the cost change?

Cost Proposal Project Area 4 – Technical Assistance and Other Services

- Describe and justify any known costs for services you would recommend.
- Include hourly cost for staff that may be assigned to contract.

REMINDERS

RFP Reminders

- Read RFP thoroughly
- Be specific around minimum qualifications, your capabilities, etc.
- Check the HBEX solicitation webpage often for updates.
 - Sept. 7 posting for responses to questions and RFP addenda.
- Fill out all forms completely and sign (blue ink!)
- Meet page limitations, copy requirements and deadlines

QUESTIONS RECEIVED

Q & A Top 10

1. California-based Project Lead
2. Timeline/frequency (of surveys and RFP)
3. Deliverables (specify, clarify)
4. Member Survey Functionality/Survey Questions
5. RFP language vs. Information about Previous Surveys
6. Survey Questions and Parameters
7. Cost/Budget
8. Contractual
9. Other RFP related
10. Other - General

OTHER QUESTIONS?