

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor’s Question:	State’s Response:
Questions and Responses Posted on January 11, 2012		
1	Will the Exchange provide a Microsoft Word version of the Model Contract and Attachments? This will be helpful when vendors submit their proposals to the Exchange.	Yes, the Microsoft Word version will be made available and will be posted on the Exchange’s website at www.healthexchange.ca.gov , under the “Solicitations” tab.
2	Which organizations obtained copies of the solicitation document?	<p>The following organizations obtained copies of the solicitation document:</p> <ol style="list-style-type: none"> 1. Weber Shandwick; 2. Behr Communications; 3. Full Court Press Communications; 4. GMMB; 5. Lake Research Partners; 6. Runyon Saltzman & Einhorn; 7. Allison+Partners; 8. Perry Communications Group, Inc. 9. Rubin Postaer & Associates; 10. Hill and Knowlton; 11. Edelman and Precision Public Relations; 12. Ogilvy and Mather; 13. Burness Communications; 14. GYMR; 15. Sherry Matthews; 16. Communications Consortium; 17. Ketchum; 18. Landis Communications Inc.; 19. Better World Advertising; 20. Social Science Research Center; 21. Katz & Associates, Inc.; 22. DeVito/Verdi; 23. Dewey Square; 24. Working Media Group; and 25. CSU, Fullerton.

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
3	Will the Exchange convene a Bidder's Conference? How will questions from vendors be addressed and disseminated? Will vendors have access to all questions that are submitted to the Exchange from other vendors?	No, the Exchange will not convene a Bidder's Conference. However, the Exchange will accept questions from vendors by telephone or e-mail at HBEXsolicitation@hbex.ca.gov . The last day for vendors to submit questions is January 23, 2012 (by 5:00 p.m PST). The Exchange will compile questions (from all vendors) and will respond to all inquiries. Responses will be available to all vendors, which will be posted on the Exchange's website at www.healthexchange.ca.gov and BidSync. The Exchange recommends vendors to check the website and BidSync periodically to obtain the responses to all vendor inquiries. There will be regular updates to the document if additional inquires are received by the Exchange.
4	Are there any preference programs (e.g., Certified Small Business and/or Disabled Veterans Business Enterprise) in place for this solicitation?	No, the solicitation process does not factor in any preference programs during the evaluation process.
5	Who will be overseeing and managing this contract on behalf of the Exchange?	Exchange staff will oversee and manage this contract. However, the Exchange and the contractor will work closely with the project sponsors which includes the Department of Health Care Services (DHCS) and Managed Risk Medical Insurance Board (MRMIB).
6	Has a communications agency been engaged to assist with the preliminary phase of the Exchange? If so, please provide the name of the communications agency.	No, the Exchange has not been engaged with any communications agency.
7	In the solicitation, under Section E, "Approach and Methodology to Perform Services in Exhibit A, Statement of Work and Project Timeline" (page 14 of 16), please confirm that vendors should respond to this section by addressing: <ul style="list-style-type: none"> • How they plan on developing and implementing the services contained in Exhibit A, Statement of Work; and • Present other ideas, options and recommendations which 	This is correct. Under this Section, vendors need to describe the following: <ul style="list-style-type: none"> • Detailed approach in achieving and accomplishing the tasks needed by the Exchange and project sponsors; • Describe, in detail, any other alternative, innovative and creative approaches in improving concepts and

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
7 (continued)	need to be considered by the Exchange and project sponsors.	<p>strategies which were originally identified in Exhibit A, Statement of Work;</p> <ul style="list-style-type: none"> • Develop a detailed timeline and work plan which identifies key milestones and tasks that need to be performed, in order to provide services under this Agreement; and • Describe the software and tools that the proposer will use to manage this project.
8	Please provide additional information regarding the competitive negotiation process which is described in the solicitation (page 6 of 16).	All proposals will be thoroughly reviewed. The Exchange is not required to award the contract to the lowest bid proposer. But rather, this procurement process is a competitive solicitation process. Top proposers who demonstrate their ability and experience to effectively and successfully provide the services contained in the Model Contract's Exhibit A (at a competitive price) will be invited to enter into negotiations with the Exchange and project sponsors. The goal of the competitive negotiation process is to negotiate the maximum level of services available for a competitive price and for the Exchange and project sponsors to obtain the overall best value of services. The competitive negotiation process may include the Exchange and project sponsors requesting the proposer to consider other alternative, innovative and creative approaches that may not have been originally presented in the vendor's proposal and will also include negotiating the final cost proposal.
9	The solicitation specifies that the Exchange and project sponsors will negotiate the maximum levels of services available for a competitive price and to obtain the overall best value. Does this mean the Exchange and project sponsors may select more than one vendor to perform the services related to the Model Contract? Is it possible for vendors to submit a proposal only related to certain portions of the statement of work?	<p>Please see the response to Question #8 above for more details about the competitive negotiation process.</p> <p>No, the Exchange and project sponsors will not select more than one vendor. Proposers must meet the minimum qualifications and be able to demonstrate their ability to successfully provide all of the services contained in the Model Contract's Exhibit A (Statement of Work). The</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
9 (continued)		<p>consulting services being procured through this solicitation are highly technical and complex. Given the statement of work, which is broad in its statewide outreach and education campaign and the diversity of the target populations, the Exchange and project sponsors encourage vendors to consider establishing strong partnerships with other entities (e.g., subcontractors) that are experts and have experience in specialized areas.</p> <p>For example, the statement of work includes the design of a comprehensive outreach and education campaign and the development of a plan for the Individual Exchange's Assisters programs. While the Assisters Program may be a related component of the outreach and education strategies, the development of the Assisters Program's functions are distinct from the design and development of statewide outreach and education campaign.</p>
10	<p>How will the Exchange and project sponsors score the proposals? How will the proposers be evaluated against one another?</p>	<p>All proposals will be thoroughly reviewed. There will be no specific scoring to any proposal. Rather, the Evaluation Team will make a consensus decision when identifying top proposers who will be invited to enter into negotiations with the Exchange and project sponsors. Top proposers are those who demonstrate their ability and experience to effectively and successfully provide the services contained in the Model Contract's Exhibit A (at a competitive price) and meeting the goals identified in the solicitation. The Negotiation Team will make a consensus decision and shall make a recommendation for contract award to the California Health Benefit Exchange Board. Please see the response to Question #8 above for more details about the competitive negotiation process.</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
11	Please provide electronic copies of the various reports and research documents referenced in the Model Contract's Exhibit A, Item I.	<p>The Model Contract's Exhibit A, Item I (Research and Analysis), identifies a variety of reports and documents that the contractor is required to thoroughly review. The following documents are located on the Exchange's website at www.healthexchange.ca.gov :</p> <ul style="list-style-type: none"> • California Patient Protection and Affordable Care Act (CA-ACA); • Level I Establishment Grant; and • Proposed Federal Regulations. <p>The Federal Patient Protection and Affordable Care Act (ACA) may be located at: www.healthcare.gov</p> <p>Maryland's Health Benefit Exchange information may be located at: www.dhmf.maryland.gov</p>
12	The Statement of Work (Model Contract's Exhibit A) identifies deliverables being due within the first 2 months of the contract period (e.g., March 2012 and April 2012). Are the deliverable due dates correct? If the deliverable due dates are correct, since the contract period is through October 2013, what type of activities and services will be performed for the remaining part of the contract period?	<p>Yes, many of the deliverables are due within the first 2 months of the contract period (e.g., March 2012 – April 2012). These deliverables are required in order to assist the Exchange to apply for the Level II Grant Application, as specified in Exhibit A, Item VIII (Develop Implementation Timeline and Identify Funding Needed for the Level II Grant Application Process), of the Model Contract. The Exchange and project sponsors encourage vendors to consider establishing strong partnerships with other entities (e.g., subcontractors) that are experts and have experience in specialized areas, in order to ensure that project goals, objectives and deliverables are achieved. However, in the event the deliverable timelines are too aggressive, proposers may make recommendations in their proposals to re-prioritize the deliverable due dates. Should proposers make such recommendations, proposers must explain the rationale behind each recommendation and describe how the</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
12 (continued)		<p>recommendation will continue to achieve the goals and objectives described in the Statement of Work.</p> <p>The activities and services performed by the Contractor for the remaining part of the contract period includes both the ongoing communications and media support, as well as the refinement of all previously submitted deliverables and potentially the development of the Model Contract Solicitation Document to secure services from another vendor to implement the comprehensive short-term and long-term statewide marketing, outreach and education strategies, approaches and activities which are described in Exhibit A, Item VI, of the Model Contract. However, the development of a Model Contract Solicitation will occur only if the Exchange does not amend the Agreement to procure additional implementation services from the Contractor, as noted in Exhibit A, Item V, of the Model Contract.</p> <p>The dues dates for deliverables that will occur in May 2012 through October 2013 have not been identified by the Exchange and project sponsors at this time. Proposers should provide recommendations on deliverable due dates in their proposals.</p>
13	Will the implementation activities set forth in Exhibit A, Item III, of the Model Contract be separate from activities referenced in the overall short-term and long-term statewide marketing, outreach and education campaign plan?	<p>The Exchange and project sponsors encourage vendors to consider establishing strong partnerships with other entities (e.g., subcontractors) that are experts and have experience in specialized areas, in order to ensure that project goals, objectives and deliverables are achieved.</p> <p>Yes, the implementation activities set for in Exhibit A, Item III (Immediate and Near-Term Communications and Media Plan Activities) are separate from the activities referenced in Exhibit A, Item IV (Development and Design a</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
13 (continued)		<p>Comprehensive Statewide Marketing, Outreach & Education Campaign Plan).</p> <p>Under Exhibit A, Item III (Immediate and Near-Term Communications and Media Plan Activities), the Contractor is required to develop, provide and implement immediate and near-term support and assistance with communications media activities. This includes the launching of the Exchange's branding.</p> <p>However, under Exhibit A, Item IV (Development and Design a Comprehensive Statewide Marketing, Outreach & Education Campaign Plan), the Contractor is required to develop and design effective, comprehensive short-term and long term statewide marketing, outreach and education campaigns to effective and successfully assist consumers to apply for, enroll and retain coverage in state affordable health insurance programs in California. Exhibit A, Item IV does not include the activities to actual implement the statewide marketing, outreach and education campaigns.</p> <p>However, under Exhibit A, Item V (Implementation of Statewide Marketing, Outreach & Education Campaign Plan), the Exchange and project sponsors shall make a decision about the continuation of the contract to implement statewide marketing, outreach and education campaigns. If directed by the Exchange, mutually agreed upon by the Contractor, and subject to Board approval, the Exchange may amend the contract's Statement of Work (Exhibit A) and Budget Detail and Payment Provisions (Exhibit B) to procure additional services, which may include actual implementation of the project sponsors-approved statewide marketing, outreach and education campaign strategies.</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
14	Has the Exchange determined its immediate and near-term implementation activities moving forward?	No, the Exchange has not identified all of its immediate and near-term implementation activities. The Exchange is relying on each proposer to provide recommendations on immediate and near-term communications and media activities that the Exchange may consider to implement, as set forth in Exhibit A, Item III, of the Model Contract.
15	Will the vendor, who is awarded the contract, be eligible to implement the statewide marketing, outreach and education campaign strategies?	<p>Please see response to Question #13 above. However, in the event the Exchange does not amend the contract to procure additional services to implement the project sponsors-approved statewide marketing, outreach and education campaign strategies, then, the vendor is not eligible to participate in any implementation activities which occur as a result of the services provided by the Contractor under this Agreement. The Contractor cannot recuse itself from performing the services set forth in the Model Contract's Exhibit A, Item VI (Model Contract Solicitation Document).</p> <p>Refer to provisions pertaining to "Conflict of Interest for Selected Contractor" which is contained in the solicitation document (under Section #8, page 7 of 16) and the Model Contract's Exhibit E, Item E (Contractor Limitations).</p>
16	What will be the Exchange's and project sponsors' determining factors to decide whether or not the state will amend the contract to procure additional services which may include actual implementation of the comprehensive statewide marketing, outreach and education campaign strategies? When will this decision be made?	<p>The Exchange and project sponsors will closely monitor the Contractor's performance under the Agreement. The monitoring of the Contractor's performance includes, but is not limited to, the Contractor's:</p> <ul style="list-style-type: none"> • Ability to successfully and effectively perform all required services; • Ability to meet the Exchange's and project sponsors' deliverable due dates; • Ability to ensure the quality and accuracy of the Contractor's work and deliverables;

**Contract Solicitation and Model Contract – HBEX2
 Communications Support for the Outreach & Education Campaign Plan and Assisters Program
 Questions from Vendors**

Question Number:	Vendor’s Question:	State’s Response:
16 (continued)		<ul style="list-style-type: none"> • Ability to make sound and data-driven recommendations; • Ability to design and develop a comprehensive statewide marketing, outreach and education campaign plan which has quality, originality and feasibility; • Ability to successfully and effectively implement the comprehensive statewide marketing, outreach and education campaigns; • Ability to effectively communicate (orally and in writing) with the Exchange and project sponsors; and • Ability to successfully and effectively manage the project. <p>Upon final review and acceptance of all deliverables, the Exchange and project sponsors will make a decision about the continuation of the contract to implement the comprehensive statewide marketing, outreach and education campaign strategies. The amendment to the contract for additional services will be negotiated with the Contractor, must be mutually agreed upon by the Contractor, and will require the California Health Benefit Exchange Board’s approval.</p>
17	Please clarify what is meant by the term “Navigators.”	<p>Proposed Federal Regulations (e.g., ACA Establishment of Exchanges and Qualified Health Plans) uses the term “Navigators” throughout the Regulations. Navigators will assist individuals apply for and enroll in affordable health insurance programs in California. The roles of Navigators are very similar to the roles of “Assisters.” Proposed Federal Regulations can be found on the Exchange’s website at www.healthexchange.ca.gov, under the “Federal Guidance” tab.</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
18	Is the Assisters Program a brand new program which does not currently exist?	Yes, the Assisters Program will be a brand new program to assist individuals apply for and enroll in affordable health insurance programs in California. However, California has used similar Assisters Programs in the past for the Medi-Cal and Healthy Families programs.
19	Was a consultant or agency engaged to assist the Exchange with its Level I Grant Application? If so, who was the consultant or agency?	Yes, the Exchange hired a technical consultant to assist the Exchange in its development of the Level 1 Grant Application. The consultant was Kelch Associates. However, if there are specific questions related to the Level 1 Grant Application, please submit all inquiries directly to the Exchange by January 23, 2012 (by 5:00 p.m.). Do not directly contact the Exchange's consultant, Kelch Associates.
20	For the Model Contract, Exhibit B (Budget Detail and Payment Provisions), deliverables are based on a fixed cost. Can proposers submit changes to the payment schedule as part of a proposed modification to the model contract language, since it is more appropriate to pay the Contractor on an hourly basis since some of these deliverables require ongoing services?	No, proposers cannot modify the Model Contract's Exhibit B (Budget Detail and Payment Provisions). All of the deliverables are based on a fixed cost. However, as set forth in Exhibit B, Item A.17, for tasks and services related to any additional refinements and modifications for any deliverable which occurs after the deliverable has been previously accepted by the Exchange and project sponsors, the Contractor shall be paid for such services based on an hourly rate. The vendor's proposed hourly rate is also reflected in Attachment 1 (Proposal Cost Format).
21	Attachment 1 (Cost Proposal Format) does not include costs for the services provided in Exhibit A, Item I (Research and Analysis), of the Model Contract. Why is this portion of the statement of work not included as part of Attachment 1?	Activities related to Research and Analysis activities, as set forth in Exhibit A, Item I, of the Model Contract, are intentionally not included in Attachment 1. However, the proposer may consider including costs related to any research and analysis activities as part of other deliverable costs which are included in Attachment 1, since research and analysis activities are critical in order to develop and finalize any deliverable.

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
22	Attachment 1 (Cost Proposal Format) does not include costs for services provided in Exhibit A, Item IX (Project Work Plan) and Item X (Project Meetings). Why is this portion of the statement of work not included as part of Attachment 1?	Activities related to the development and maintenance of the Project Work Plan, as well as facilitating and convening Project Meetings, are intentionally not included in Attachment 1. However, the proposer may consider including costs related to services provided for the Project Work Plan and Project Meetings as part of other deliverable costs which are included in Attachment 1, since these activities are critical in order to develop and finalize any deliverable.
23	Attachment 1 (Cost Proposal Format) only includes ten (10) line items under the column, "Professional Level and Subcontractors and Administrative Overhead Rate." Can there be more than ten (10) line items under this column?	Yes, the proposers may include additional line items which exceeds the number of line items shown on Attachment 1, in order to demonstrate the project cost for each deliverable.
24	Attachment 1 (Cost Proposal Format) does not have a specific area to identify "other direct costs." How can other direct costs be included on Attachment 1?	In the event the proposer needs to identify "other direct costs," include these costs in the column titled, "Professional Level and Subcontractors and Administrative Overhead Rate." Include a brief description which explains the type of "other direct cost" being identified and clearly distinguish the cost being allocated for "other direct costs."
Questions and Responses Posted on January 20, 2012		
25	The solicitation states that the Exchange is currently funded through August 14, 2012 under the Level I Establishment Grant. However, the term of the contract is through October 31, 2013. Please clarify how the services will be funded after the expiration date of the Level 1 Establishment Grant.	The Exchange anticipates the entire scope of this contract will be supported by resources committed under the Level 1 Establishment Grant. Continuation of the contract beyond the Level I Establishment Grant period is contingent on the availability of federal funds. Please refer to the Model Contract's Exhibit B (Budget Detail and Payment Provisions), Item C (For Contracts with Federal Funds).
26	Please clarify what is meant under Section 7 (Contracting Process) on page 7 of 16 of the solicitation document, which states that the Exchange may: <ul style="list-style-type: none"> • Accept proposal as submitted; 	During the evaluation process, the Exchange and project sponsors may reject a proposal in its entirety or may accept a proposal without additional modifications to the vendor's proposed statement of work. In the event the Exchange and

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
26 (continued)	<ul style="list-style-type: none"> • Reject a part or all of a proposal; and/or • Reject all proposals. 	<p>project sponsors accept the vendor's proposed statement of work in its entirety and the vendor is identified as a top proposer (as described in the response to Question #8), the vendor will be invited to enter into final negotiations regarding the final cost proposal.</p> <p>The Exchange and project sponsors may also decide to reject a part of the proposal during the evaluation process. Should this occur and the vendor is identified as a top proposer, during the competitive negotiation process, the Exchange and project sponsors may request the vendor to consider other alternative, innovative and creative approaches that may not have been originally presented in the vendor's proposal. This negotiation process will also include negotiating the final cost proposal. In the event the proposer is awarded the contract, the Contractor will be required to perform all final negotiated services as the prime Contractor as part of the contract award.</p> <p>The Exchange and project sponsors will not select more than one vendor to perform a portion of the statement of work. The awarded Contractor will be required to provide all of the services that are negotiated through its partnership with other entities (e.g., subcontractors). Please see response to Question #9 for more details.</p> <p>If none of the proposals meet the project's needs, objectives and goals, the Exchange and the project sponsors retain the option of rejecting all proposals.</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
27	Will an oral interview with potential vendors be a part of the evaluation and selection criterion?	As previously explained in the response to Question #8, top proposers who demonstrate their ability and experience to effectively and successfully provide the services contained in the Model Contract's Exhibit A (at a competitive price) will be invited to enter into negotiations with the Exchange and project sponsors. The negotiation process will include an interactive discussion with the top proposers. The outcome of the negotiation process will result in the Exchange and the project sponsors selecting and awarding the contract to one top proposer.
28	Please confirm that proposers should not use "track changes" when making modifications and revisions to the Model Contract.	Do not use "track changes." In the event a proposer needs to make additional modifications to the Model Contract, manually insert the " strikeout " font to reflect deletions and manually insert the " underline " font to signify additional proposed contract language which was not originally contained in the Model Contract.
29	The solicitation indicates that the proposer must identify contracts it currently has (or previously had) with the State of California. In the event the proposer was a subcontractor to the State's prime contractor, the proposer may not have the contract number, contract amount, and/or contact person's name and telephone number. Should the proposer continue to provide the information described in Section B.17 shown on the solicitation (pate 13 of 16)?	Yes, the proposer must identify the contracts in order for them to be considered by the Evaluation Team. In the event the proposer was a subcontractor of the State's prime contractor and does not have the prime contractor's information, the proposer at a minimum must identify the following: <ul style="list-style-type: none"> • Contracting State of California department's name; • Contract term date (i.e. start and end dates) of the subcontract; • Summary of services performed and provided under the subcontract; • Contract amount of the subcontract; • Prime contractor's name; and • Prime contractor's telephone number.

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
30	Can references be provided for subcontractors?	<p>In the event the subcontractor has a significant role and partnership with the proposer to perform the services contained in the Model Contract's Exhibit A (Statement of Work), in addition to the proposer's own references, the proposer may include the subcontractor's references as well. Up to five (5) subcontractor references may be provided, containing the information outlined in Section 12.B.16 (Proposal Format & Check List) identified in the solicitation on page 13 of 16.</p> <p>If the subcontractor had a previous or is a current contractor with the State of California, the proposer may include information, describing the subcontractor's contracts prior to three (3) years. The proposer should provide the information outlined in Section 12.B.17 (Proposal Format & Check List) identified in the solicitation on page 13 of 16.</p> <p>The subcontractor's references and prior/current contracts will be included as part of the proposer's description under Section 12.D (Use of Subcontractors). The additional information will not count towards the maximum 5 pages under this Section of the solicitation document. But rather, the additional information will be included as attachments to Section 12.D.</p>
31	The solicitation indicates that samples of marketing, outreach and education materials may be provided by a proposer. There is a 10-page limit if a proposer elects to provide samples. If a proposer submits a sample of a multi-page brochure, will each page of the brochure be counted towards the 10-page limit? Also, can samples include materials produced by a subcontractor?	<p>Yes, there is a 10-page limit. In the event the proposer submits a multi-page brochure, each page of the brochure will be counted towards the 10-page limit.</p> <p>In the event the subcontractor has a significant role and partnership with the proposer to perform the services contained in the Model Contract's Exhibit A (Statement of Work), samples may also include the work product of subcontractors. However, the samples must be labeled as being produced by the subcontractor. In the event the</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
31 (continued)		proposer includes samples of the subcontractor's work product, the samples will not count towards the prime proposer's 10-page limit. However, any of the subcontractors' samples (collectively for <u>all</u> subcontractors) will have a 10-page limit.
32	In the event a proposer would like to include radio and TV samples, in what format should these samples be provided? Can a proposer submit a DVD or CD?	A proposer may submit radio and TV samples in a CD or DVD format.
33	The solicitation and Model Contract's statement of work specify that recommendations identified by the Contractor must result in successful and effective outreach and education campaigns being implemented in multiple languages, in order to reach the diverse target populations. How many multiple languages will the campaigns support?	<p>All recommendations must be designed and developed in a manner in which the proposed outreach and education strategies can be successfully implemented in multiple languages with a multicultural approach. At this time, the Exchange and project sponsors have not precisely identified which multiple languages the campaign will support. However, at a minimum, the campaign will be available in English, Spanish and several Asian languages. The Exchange and project sponsors may determine that the multicultural approach includes the Medi-Cal threshold languages which include:</p> <ul style="list-style-type: none"> • <u>Spoken Languages:</u> <ol style="list-style-type: none"> 1. English; 2. Arabic; 3. Armenian; 4. Farsi; 5. Cambodian; 6. Cantonese; 7. Mandarin; 8. Hmong; 9. Korean; 10. Russian;

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
33 (continued)		<p>11. Spanish; 12. Tagalog; and 13. Vietnamese.</p> <ul style="list-style-type: none"> • <u>Written Languages:</u> <ol style="list-style-type: none"> 1. English; 2. Arabic; 3. Armenian; 4. Farsi; 5. Cambodian; 6. Traditional Chinese Character; 7. Hmong; 8. Korean; 9. Russian; 10. Spanish; 11. Tagalog; and 12. Vietnamese. <p>Please see responses to Questions #13, #15 and #16 regarding clarification about implementation activities which may be separately negotiated with the Contractor.</p>
34	<p>Considering the deliverable due dates are aggressive, what type of State staff support can the Contractor anticipate? For example, will there be staff assistance for implementation of the program launch and will there be ongoing public communication of activities conducted by staff?</p>	<p>The Exchange and project sponsors will have regular bi-weekly meetings with the Contractor, in order to monitor, manage and provide guidance to the Contractor. There will be a single State project manager for all contracted-related activities. State staff will be heavily involved and work closely with the Contractor to ensure project goals and objectives are met. Regular updates and approvals will occur at the Executive Management level and at monthly Board Meetings. Under the guidance and direction of the State project manager, the Contractor will be required to implement</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
34 (continued)		immediate and near-term media activities, as described in the Model Contract's Exhibit A, Item III (Immediate and Near-Term Communications and Media Plan and Activities).
35	Please describe the review and approval process of all deliverables.	<p>All deliverables must be reviewed and accepted by the Exchange and project sponsors, as described in the Model Contract's Exhibit A, Item XI (Contract Deliverables). Since the deliverable due dates are aggressive, State staff are committed to promptly reviewing all deliverables, in order to meet all project goals and objectives. The State staff review of any deliverable may take up to five (5) business days.</p> <p>All deliverables will require Executive Management approval. Recommendations provided by the awarded Contractor may also require Board approval, before accepting the Contractor's final work product.</p>
36	In the Model Contract's Exhibit A, Item IV.A (on page 5 of 21), it states that "the implementation of outreach and education strategies shall occur in advance of the 2013 Exchange Open Enrollment Period and shall include outreach strategies that need to be accomplished through December 31, 2013." However, the contract term ends on October 31, 2013. Please clarify how the implementation activities will occur considering the contract ends prior to December 31, 2013.	<p>The contract term starts March 1, 2012 and ends October 31, 2013. The awarded Contractor will design and develop short-term and long term outreach and education campaigns, which does not include any implementation activities. The short-term campaign shall be designed and developed to recommend implementation strategies that need to occur through December 31, 2013. For the long-term campaign, the awarded Contractor will design, develop, and recommend implementation strategies that need to occur on and after January 1, 2014, in order to continuously promote public awareness about all state affordable health insurance programs and availability of non-subsidized coverage.</p> <p>As noted in the Model Contract's Exhibit A, Item V (Implementation of Statewide Marketing, Outreach & Education Campaign Plan), the Exchange and project sponsors may consider negotiating and amending the contract to procure additional services, which may include</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
36 (continued)		actual implementation of the project sponsors-approved statewide marketing, outreach and education campaign. Please see response to Questions #12 through #16 for more details regarding implementation activities.
37	What template requirements or design limitations, if any, will apply to the California Health Benefit Exchange website redesign? For example, most state websites currently have a photo of the governor and a link to his website and the navigation is based on a series of tabs directly below the <i>CA.gov logo</i> . Would these design requirements apply to the redesign of the Exchange's website? Or, will the awarded Contractor have broad latitude regarding the navigation scheme and general visual design?	The California Health Benefit Exchange's website must comply with general state requirements for state websites. However, the awarded Contractor may have some latitude and flexibility regarding the navigation scheme and general visual design, so long as the website redesign complies with state requirements.
38	Does the enhancement and redesign of the California Health Benefit Exchange website also include implementing a Spanish website as well?	No, the redesign of the California Health Benefit Exchange website will not include implementing a Spanish website.
39	In the Model Contract, Exhibit A, Item III.B (Immediate and Near-Term Communications and Media Plan and Activities), the awarded Contractor will be required to translate media materials into other threshold languages, as directed by the Exchange. What threshold languages should a proposer assume when submitting their cost proposal?	<p>At this time, the Exchange has not precisely identified the threshold languages in which the media materials will be translated. The proposer should assume that all media materials described in Exhibit A, Item III.B, will at a minimum be translated into Spanish and potentially several Asian languages. The Exchange may determine that the media materials will be translated into the Medi-Cal threshold languages as noted below. However, the vendor should recommend and identify the types of media materials and/or mediums they believe would be appropriate to translate. When providing the vendor's recommendation, the vendor should explain its reason and rationale for each of their recommendations.</p> <ul style="list-style-type: none"> • <u>Spoken Languages:</u> <ol style="list-style-type: none"> 1. Arabic; 2. Armenian;

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor’s Question:	State’s Response:
39 (continued)		<ol style="list-style-type: none"> 3. Farsi; 4. Cambodian; 5. Cantonese; 6. Mandarin; 7. Hmong; 8. Korean; 9. Russian; 10. Spanish; 11. Tagalog; and 12. Vietnamese. <ul style="list-style-type: none"> • <u>Written Languages:</u> <ol style="list-style-type: none"> 1. Arabic; 2. Armenian; 3. Farsi; 4. Cambodian; 5. Traditional Chinese Character; 6. Hmong; 7. Korean; 8. Russian; 9. Spanish; 10. Tagalog; and 11. Vietnamese.
40	Please explain the stakeholder process that the Exchange has been involved with in the past and stakeholder activities in the future.	Many of the stakeholder feedback are received in various forums while the Exchange is developing and planning the implementation of the Individual Exchange and Small Business Health Options Program (SHOP). The Exchange receives feedback from stakeholders during our monthly Board Meetings. In addition, in 2011, the Exchange

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
40 (continued)		<p>convened many Stakeholder Work Groups throughout the state. The Exchange plans to convene additional Stakeholder Work Groups in 2012.</p> <p>Information regarding the stakeholder process can be accessed on the Exchange's website at www.healthexchange.ca.gov , under the "Stakeholders" tab.</p> <p>The information and feedback received from stakeholders will assist in the development and design of the comprehensive statewide marketing, outreach and education campaign plan, as described in the Model Contract's Exhibit A, Item III.G.</p>
41	<p>In the Model Contract's Exhibit A, Item IV.G (Stakeholder Input and Feedback), there is no deliverable due date identified under Exhibit A, Item IV.I (Marketing, Outreach & Education Plan Deliverables). Please confirm that there is not a missing deliverable for the Stakeholder Input and Feedback.</p>	<p>The Model Contract, Exhibit A (Statement of Work), intentionally does not have a separate deliverable for Item IV.G (Stakeholder Input and Feedback). Rather, the stakeholder input and feedback will be incorporated into all deliverables produced by the awarded Contractor, as required in the Agreement.</p>
42	<p>Additional clarification and comments to responses previously provided in Questions #9, #12, and #13.</p>	<p>Please see yellow highlighted text which identifies new clarification which was not previously included in the original responses posted on January 11, 2012.</p>
43	<p>Please provide more information about the conflict of interest provision, which is described in Section 8 (Conflict of Interest for Selected Contractor) of the solicitation and Exhibit E, Item E (Contractor Limitations).</p>	<p>This request for clarification is currently under review. The Exchange will respond to this by January 25th.</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
Questions and Responses Posted on January 25, 2012		
44	<p>In Section 5 (Additional Information) of the solicitation, the Exchange and project sponsors reference two (2) websites:</p> <ul style="list-style-type: none"> • www.healthcare.gov; and • www.healthexchange.ca.gov . <p>Is the www.healthcare.gov the correct website? Or, should the solicitation reference www.healthcare.ca.gov ?</p>	<p>The solicitation references the correct websites for:</p> <ul style="list-style-type: none"> • www.healthcare.gov; and • www.healthexchange.ca.gov . <p>The www.healthcare.gov website provides information about the Federal Patient Protection and Affordable Care Act. This website was created and is maintained by the federal government.</p> <p>The www.healthexchange.ca.gov website specifically provides information about the California Health benefit Exchange.</p>
45	<p>Please provide clarification if the proposals should be single or double-sided.</p>	<p>The proposals may be submitted on either single or double-sided paper. However, the Exchange recommends that proposals be submitted on double-sided, recycled paper (if possible).</p>
46	<p>Is the State of California considering expanding coverage to adults whose income level is above the Medicaid (e.g., Medi-Cal in California) eligibility requirements?</p>	<p>Yes, the California Legislature has been considering legislation to expand affordable health insurance coverage to include adults whose income is above the Medi-Cal income guidelines. This new health insurance program would be the Basic Health Program (BHP) as allowed under the Affordable Care Act. Effective January 1, 2014, Medi-Cal will cover adults whose income is at or below 138% of the federal poverty level. If the BHP is enacted into state law, the BHP will provide health insurance coverage to adults whose income is above 138% to 200% of the federal poverty level and the statewide outreach and education campaigns will include strategies for the BHP potentially eligible population.</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor’s Question:	State’s Response:
47	<p>Please provide more information about the conflict of interest provision, which is described in Section 8 (Conflict of Interest for Selected Contractor) of the solicitation and Exhibit E, Item E (Contractor Limitations).</p>	<p>Some organizations have requested that the Exchange provide some examples of conflicts of interest and the appearance of conflicts of interest. Since the conflict of interest provision is fact driven, it is difficult for the Exchange to provide examples. In the event organizations have questions or need clarification regarding the conflict of interest provision set forth in the solicitation and Model Contract, the Exchange encourages the organization to confer with its private legal counsel.</p> <p>Organizations who may be uncertain whether the appearance of a conflict of interest may reasonably exist must include a full disclosure statement which provides and describes the relevant details of any activity which the organization believes may have the appearance of a conflict of interest for the Exchange’s consideration. The full disclosure statement must also include a description of any source of income that may create a conflict with the contractual duties and the nature of the activity performed for the source of income. In addition, the organization must describe firewalls that will be put into place which describes how the organization anticipates complying with the conflict of interest provision, if they are awarded the contract. The full disclosure statement must be included as an Attachment (or Appendix) to the organization’s proposal and will be labeled as such.</p>
48	<p>How many top proposers do the Exchange and project sponsors anticipate inviting to the negotiation process?</p>	<p>At this time, the Exchange and project sponsors cannot project the number of top proposers who will be invited to participate in the negotiation process. Top proposers will be identified during the evaluation process. Please see responses to Questions #8 - #10 for more details.</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
49	How many people will be on the Evaluation Team? Will the Evaluation Team Members all be Exchange representatives? Or, will other individuals representing other organizations be a part of the Evaluation Team?	The Exchange anticipates that there will be approximately 3 – 6 Evaluation Team Members. The Evaluation Team Members will include Exchange and project sponsors representatives, as well as representatives from other state departments who have been involved in various types of statewide outreach and education campaigns.
50	In the event a proposer is invited to participate in negotiations with the Exchange and project sponsors, will the proposer be required to make a verbal presentation of their proposal?	The negotiation process will include an interactive discussion with the top proposers, regarding their proposal and their recommended alternative, innovative and creative approaches. The Exchange and project sponsors may request top proposers to make a verbal presentation of their proposal.
51	Are the Exchange and project sponsors expecting proposers to recommend other alternative, innovative and creative approaches when submitting their proposals?	The Exchange and project sponsors are procuring services that are described in the solicitation and Model Contract, Exhibit A (Statement of Work). We are relying on the proposers technical and creative expertise to identify other alternative, innovative and creative approaches that should be considered by the Exchange and project sponsors. We encourage proposers to identify other alternative, innovative and creative approaches which were not originally included in the Model Contract's statement of work.
52	Section 12.E (Approach and Methodology to Perform Services in Exhibit A, Statement of Work and Project Timeline on page 14 of 16) states that there is a 20-page maximum. Can the Exchange consider expanding this 20-page maximum, so that proposers can effectively and concisely respond to their approaches? The 20-page maximum is too restrictive to describe the following: <ul style="list-style-type: none"> • Detailed approach in achieving and accomplishing the tasks defined in the solicitation and Model Contract; • Detail description of any other alternative, innovative and creative approaches in improving the concepts and strategies which were originally identified in the Model 	No, unfortunately, the Exchange cannot expand the 20-page maximum for Section 12.E.

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
52 (continued)	<p>Contract's Exhibit A, Statement of Work;</p> <ul style="list-style-type: none"> • Detailed timeline and work plan which identifies key milestones and tasks that need to be performed; and • Description of the software and tools that the proposer will use to management this project. 	
53	<p>Section 12.E (Approach and Methodology to Perform Services in Exhibit A, Statement of Work and Project Timeline on page 14 of 16) directs proposers to submit a detailed timeline and work plan which identifies key milestones and tasks that need to be performed. How is this project work plan different from the Exhibit A (Statement of Work), Item IX (Project Work Plan)?</p>	<p>All proposals must include a detailed timeline and project work plan as described in Section 12.E. In the event the proposer is awarded the contract, then, the proposer may use the timeline and project work plan as a baseline to update the documents in order for them to reflect the final outcome of all negotiated services. The awarded Contractor may consider using the updated documents to perform the services described in Exhibit A, Item IX.</p>
54	<p>Section 12.E (Approach and Methodology to Perform Services in Exhibit A, Statement of Work and Project Timeline on page 14 of 16) directs proposers to describe the software and tools that the proposer will use to manage this project. Do the Exchange and project sponsors have particular project management software or tools that they are accustomed to?</p>	<p>No, the Exchange and project sponsors do not have particular project management software or tools that we are accustomed to. We are requesting proposers to provide recommendations on the types of software and tools that would be used to manage this project.</p>
55	<p>Section 12.F (Acceptance/Modification to Model Contract Language on page 15 of 16) in the solicitation directs proposers to submit changes to the Model Contract, in the event there are proposed modifications. Do proposers submit a separate bound copy of the revised Model Contract?</p>	<p>No, proposers will not submit a separate bound copy of their revised Model Contract. Rather, the revised Model Contract will be a part of the proposer's bound copy. Proposers will include the revised document as an Attachment (or Appendix) as part of their proposal.</p>
56	<p>The Exchange and project sponsors encourage vendors to consider establishing strong partnerships with other entities (e.g., subcontractors) that are experts and have experience in specialized areas. Is the 5-page limit which summarizes the subcontractors (Section 12.D, Use of Subcontractors, on page 14 of 16) limited to each subcontractor? Or, is the 5-page limit for all subcontractors?</p>	<p>The five-page limit is for <u>each</u> subcontractor who will work closely with the proposer to provide the services contained in the Model Contract's Exhibit A (Statement of Work).</p> <p>Please see the response to Question #30 for more details.</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
57	Due to the technical nature of some aspects of the statement of work, is it likely that more than one partnership (e.g., subcontractor) is needed to provide experience in specialized areas?	The proposer needs to assess whether or not it is necessary for them to establish more than one partnership (e.g., subcontractor) to provide technical experience in specialized areas in order to successfully achieve the project goals, objectives and deliverables. The proposer's assessment should be based on their own experience and resources, regarding whether or not the proposer itself can perform all of the services with limited partnerships.
58	Is there a limitation regarding the total percentage of services that can be preformed by subcontractors under this Agreement?	No, there is no limitation regarding the total percentage of services that can be performed with subcontractor partnerships. The Exchange and project sponsors encourage vendors to consider establishing strong partnerships with subcontractors that are experts and have experience in specialized areas, in order to ensure that project goals, objectives and deliverables are achieved. While certain services may be provided by the subcontractor(s), the awarded prime Contractor will be completely responsible to ensure that all project goals, objectives and deliverables are met. The Exchange will hold the prime Contractor responsible in managing, overseeing, and providing all negotiated services and deliverables.
59	In the event the proposer includes samples of marketing and outreach materials (e.g., brochures, tri-folds, flyers, etc.) which are described in Section K of the solicitation (page 16 of 16), should the proposer include original samples of such materials in all of the eight (8) bound copies? Do all samples need to be originals? Or, can the proposer provide one original and seven (7) copies (e.g., PDF version)?	In the event the proposer provides hard copies of samples of marketing and outreach materials, the proposer must include samples in all eight (8) bound copies. The samples may include one original and seven (7) copies (e.g., PDF version). The original sample should be labeled as such. Proposers may also consider providing samples in a CD or DVD format. Please see response to Question #32.

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
60	In the Model Contract's Exhibit A (Statement of Work), Item III (Immediate and Near-Term Communications and Media Plan Activities), the awarded Contractor will be required to implement media materials that need to be translated into other threshold languages. Are proposers required to include translation services as a subcontractor? Please provide more clarification regarding the threshold languages.	In the event the materials will be translated by another organization (e.g. subcontractor and not by the proposer themselves), the proposers must identify the translation services as a subcontractor. Please see response to Question #39 regarding clarification on threshold languages.
61	Has the Exchange conducted any modeling and analysis of the target population which is noted in the Model Contract's Exhibit A (Statement of Work), Item IV.B.2.6 (on pages 7 – 8)? Does the Exchange have any projected enrollment numbers?	The Exchange and project sponsors are currently working with UC Berkeley and UCLA to conduct research and analysis, which includes the projected enrollment numbers of the target populations. The results of the analysis will be completed in February 2012. This information will be provided to the awarded Contractor.
62	Has the Exchange and project sponsors established precise goals for how many new Californians would be enrolled in the first year (2014), second year (2015), etc.?	The Exchange and project sponsors have not identified common goals beyond the overall goal of maximizing enrollment in a wide range of affordable health insurance programs.
63	The Model Contract's Exhibit A (Statement of Work), Item IV.B.2.6 (on page 7) specifies that the awarded Contractor will conduct market research to identify and determine target populations who are eligible for the state affordable health insurance programs. Please clarify if the "market research" is secondary or primary research?	While many surveys, studies and reports have been released by various organizations, the market survey conducted by the awarded Contractor will be considered as primary research which specifically focuses on California's targeted populations. The awarded Contractor may leverage its market research from previous surveys, studies and reports as described in Exhibit A, Item IV.C and Item IV.D (page 8 of 21).

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
64	In the Model Contract's Exhibit A (Statement of Work), Item IV.F (Focus Group Testing, Survey Research and Key Informant Surveys), it specifies that the awarded Contractor will conduct focus group testing in English, Spanish, and other languages as required by the project sponsors. Has the Exchange and project sponsors determined which other languages (besides English and Spanish) the focus group testing will be conducted in?	Focus group testing, as described in Item Exhibit A, Item IV.F, will be conducted in other languages besides English and Spanish. Focus group testing will also occur in some Asian languages . The Exchange and project sponsors will identify the appropriate languages required for all focus group testing, after the contract award.
65	In the Model Contract's Exhibit A (Statement of Work), Item IV.F (Focus Group Testing, Survey Research and Key Informant Surveys), is the proposer limited to only conducting up to eight (8) focus groups? Can the proposer recommend additional focus groups and additional research strategies?	Yes, proposers may recommend that more than eight (8) focus groups need to be conducted and may identify additional research strategies. Proposers should explain its reason for each recommendation and describe how the recommendation will achieve the objectives described in the solicitation.
66	In the Model Contract's Exhibit A (Statement of Work), Item VI (Model Contract Solicitation Document), in the event the Contractor does not perform actual implementation activities as set forth in Item V, the Contractor will assist the Exchange in the development of a model contract. What are proposers required to include in their proposals when responding to this portion of the statement of work.	<p>The services identified in Exhibit A, Item VI, requires the awarded Contractor to develop a solicitation document which will be used by the project sponsors to competitively procure services from a vendor to implement the comprehensive statewide outreach campaigns. The model contract solicitation document shall be based on the Exchange's and project sponsor's approved campaign strategies. The model contract and solicitation, shall at a minimum, include and identify the following information:</p> <ul style="list-style-type: none"> • Vendor's Minimum Qualifications; • Vendor's Desirable Qualifications; • Statement of Work and Deliverables; • Implementation Work plan and Timeline; and • Project Costs. <p>In the event proposers have recommendations on other alternative, innovative and creative approaches to this portion of the statement of work, then, proposers should</p>

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
66 (continued)		include their recommendations as part of their response to Section E of the solicitation (Approach and Methodology to Perform Services in Exhibit A, Statement of Work and Project Timeline on page 14 of 16) and Section F (Acceptance/Modifications of Model Contract language on page 15 of 16).
67	Has the Exchange and project sponsors projected the number of individuals who will receive assistance from the Assistors Program?	The Exchange and project sponsors are currently working with UC Berkeley and UCLA to conduct research and analysis, which includes the projected enrollment numbers of the target populations. The results of the analysis will be completed in February 2012. This information will be provided to the awarded Contractor.
68	When is the Level II Establishment Grant due to the federal government?	The Exchange will submit the Level II Establishment Grant <u>no later</u> than June 29, 2012.
69	Will the implementation activities for the outreach and education campaigns and Assistors Program be funded through the Level II Establishment Grant?	In the Model Contract's Exhibit A (Statement of Work), Item VIII (Develop Implementation Timeline and Identify Funding Needed for the Level II Grant Application), the awarded Contractor is required to provide technical assistance and support to the Exchange in drafting and developing the Level II Establishment Grant Application. The Level II Establish Grant (if awarded to California) will fund the actual implementation activities for the statewide outreach and education campaigns and Assistors Program.
70	Can proposers obtain an excel version of Attachment 1 (Cost Proposal Format)?	On January 11, 2012, the Exchange provided a Microsoft Word version of Attachment 1. This document is available on the Exchange's website at www.healthexchange.ca.gov , under the "Solicitations" tab. The Attachment 1 was not originally developed in an Excel format. However, proposers may consider converting Attachment 1 into an Excel format in order to include mathematical formulas when calculating and presenting their cost proposal.

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assisters Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
71	Attachment 1 (Cost Proposal Format) indicates that proposers may identify "Administrative Overhead Rate." What constitutes "Administrative Overhead Rate?"	In the event the proposer elects to include "Administrative Overhead Rate" in Attachment 1, these rates include other types of costs that are incurred by the proposer to perform the services under the Agreement. Administrative overhead rate typically includes costs for the use of equipment, rental facilities, utilities, insurance and audits, etc.
72	In Attachment 1 (Items 1 – 2), how do proposers identify costs specifically for administrative overhead rate, direct costs and other types of expenses that are necessary and factored into their cost proposal?	<p>See responses to Question #24 for more details. Proposers must identify these costs in Attachment 1. However, in the event the template for the Cost Proposal Format does not allow the flexibility for the proposer to identify certain costs, the proposer may include an Attachment 1A to its cost proposal.</p> <p>For example, in Attachment 1, the proposer will clearly identify all costs that justify their fixed cost for services which are noted in Attachment 1's Items 1 - 2. Attachment 1 may generally distinguish the line item as being an administrative overhead rate, direct cost, and/or other types of expenses. However, for Attachment 1A, the proposer will explicitly describe and itemize out what the administrative overhead rate, direct cost, and/or other types of expenses are being allocated towards (e.g., travel, printing of collateral materials, etc.).</p>
73	Attachment 1 (Cost Proposal Format, pages 1 – 2) indicate that subcontractors be listed in the 1 st column, under "Professional Level (List Each Level) and Subcontractors and Administrative Overhead Rate." Are proposers required to identify the subcontractor's personnel services including level, amount of hours and hourly cost in these tables? Or, are proposers required to only list subcontractor personnel services under Attachment 1, Item 5 (Estimated Cost for Each Subcontractor).	On pages 1 - 2 of Attachment 1, in addition to listing the proposer's Professional Level for staffing and Administrative Overhead Rate (if applicable), the proposer must also list the estimated cost of each subcontractor. This includes identifying each subcontractor's personnel services (e.g., professional level for staffing, projected amount of hours allocated, hourly cost, as well as administrative overhead rate and other direct costs [if applicable]). When identifying the subcontractor's personnel services, the proposer must clearly

**Contract Solicitation and Model Contract – HBEX2
Communications Support for the Outreach & Education Campaign Plan and Assistors Program
Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
73 (continued)		distinguish the cost being allocated for each subcontractor. Under Item 5 (Estimated Cost for Each Subcontractor), the proposer must identify the total cost for each subcontractor and provide a brief description which explains the task the subcontractor will perform.
74	Under Attachment 1 (Cost Proposal Format), Item 5 (Estimated Cost for Each Subcontractor) on page 4 of 4, do proposers identify the total dollar amount being allocated to subcontractors?	Under Item 5, proposers are required to identify the total cost for <u>each</u> subcontractor. Please see responses to Questions #71 and #73 for more details.
75	Under Attachment 1 (Cost Proposal Format), Item 3 (Identify the Projected Costs for Deliverables), do proposers summarize the costs which are listed in the tables under Items 1 - 2 (pages 1 - 2)? For Item 6 (Total Proposal Cost) are proposers adding all of the line items to identify the total proposal cost?	Yes, in Item 3, proposers must summarize the costs which are listed in the tables under Attachment 1's Items 1 – 2. In addition, in Item 6, proposers are required to add all of the line items to identify their total proposal cost . The total proposal cost includes all costs, such as professional staffing levels, administrative overhead rate, direct cost, other types of expenses, and subcontractor costs.
76	The Model Contract's Exhibit D (Special Terms and Conditions), Item F (A -133 Audit) includes audit provisions. Can costs related to an audit be a pass through component that is not a part of the fixed deliverable costs? For example, the awarded Contractor will be paid for actual services rendered under Item F, even if the audit function results in the total contract value exceeding the maximum amount of \$900,000.	The applicability of the A -133 Audit rules is complicated, fact-specific determination. The awarded Contractor could be considered a sub-recipient of the Level 1 Establishment Grant and potentially be subjected to the A -133 Audit requirements. Proposers who are concerned about the applicability of A -133 Audit requirements should raise the issue as part of Section 10.E (page 10 of 16) and Section 12.F (page 15 of 16) of the solicitation. Proposers may consider including the A – 133 Audit costs into Attachment 1 (Cost Proposal Format) as an administrative overhead rate. However, the overall contract value cannot exceed \$900,000. Please see response to Question #69 for more details.

**Contract Solicitation and Model Contract – HBEX2
 Communications Support for the Outreach & Education Campaign Plan and Assisters Program
 Questions from Vendors**

Question Number:	Vendor's Question:	State's Response:
77	Please confirm that the dollar amounts shown in the Model Contract's Exhibit B (Budget Detail Payment Provisions), Items 3 – 18 on pages 1 – 3, should be left blank.	Yes, proposers will leave the dollar amounts shown in Exhibit B, Items 3 – 18, blank. Once the Exchange and project sponsors award the contract, the dollar amounts will be included in the fully executed contract. The dollar amount will be based on the final negotiated cost proposal which identify shall be based on the total fixed costs for all deliverables.