2017-02 – Program Evaluation & Tracking

Questions and Answers

NOTE: Please review the addenda for Attachment 12 (Cost Proposal) and Exhibit B Attachment 1 (Cost Worksheet) that have been posted and which clarify the following questions:

Ques #	Questions	Answers
1.	Exhibit B – Attachment 1 – Cost Worksheet – The worksheet specifies alternatives for Tracker as 30Q and 40Q. This differs from the description of the Tracking Survey in the sample report, where is it described as 114 items. Please clarify anticipated length of survey.	You should use the question numbers stated in the amended Cost Proposal and Cost Worksheet. The actual length will be determined in consultation with the successful Proposer.
2.	Does any such ethnicity oversampling fall outside the quantities specified on the Cost Worksheet (1,000, 1,500, or 2,000 completed interviews)?	Yes.
3.	(Reference #30 above) The top section of the worksheet has placeholders to fill in a cost per completed survey. Should the costs entered into the top section (showing cost per complete) reflect only the data collection costs or should the costs include all aspects to execute the project, such as project management, sample processing, programming, data processing, and reporting?	Include all identified costs by project phase per the instructions in the revised Cost Proposal instructions and Exhibit B Attachment 1.
4.	**Attachment 12-Cost Proposal:** In the 4th paragraph of the attachment it states that Covered California will not provide compensation for any indirect charges but will pay expenses for travel. However, on page 5 of the attachment it states that proposers may include additional costs such as subcontractor management fees, administrative charges, Project Management	Proposers should provide fully-loaded rates and identify costs as noted in the revised Cost Proposal Covered California does not have knowledge about how the federal government's indirect rate is determined.

Ques #	Questions	Answers
	and consulting costs. As a part of doing business proposers incur indirect costs for general management which are actual costs necessary for a program to operate. Will Covered California allow proposers to charge for their indirect costs in accordance with their approved Negotiated Indirect Rate Agreement approved by the federal government?	
5.	**Attachment 12-Cost Proposal:** The Cost Proposal in Attachment 12 says for Area 4: Complete the Cost Worksheet (Exhibit B, Attachment 1) with requested costs that may be expected to be part of a typical project but there is no scope of work for this area. Can Covered California provide any guidance to the scope for this Area? Or will this scope be detailed in future work orders and is not required for this submission? Also, there is no section in Exhibit B, Attachment 1 for Area 4. If Covered California requires costs for Area 4 can Covered California provide a revised worksheet?	Covered California has provided a revised Cost Worksheet. Please refer to Addendum 2, posted 09/07/17. As deliverables for Project Area 4 are unknown, the full scope of research activity is still undefined, but it will include market research, consumer satisfaction, and broader research as needed. Proposers should include both loaded hourly rates for key personnel and known additional costs as applicable.
6.	**Attachment 12-Cost Proposal:** The cost proposal asks for a separate budget justification and explanation of costs for Project Area 4. RFP, Section III.C. 2) Stage 2 Evaluation Criteria (p. 17) asks for a description of TA to be provided as part of Assignment 3. Can Covered California please confirm that proposers are not expected to include the costs associated with Project Area 4 in our cost worksheet and narrative for Project Area 3 (corresponding to Assignment 3)?	Proposers should include costs as instructed in the revised Cost Proposal. Project Area 4 has personnel and additional costs only. Covered California has provided a revised Cost Worksheet. Please refer to Addendum 2, posted 09/07/17.
7.	**Attachment 12-Cost Proposal:** The Cost Proposal says that the Area 1 and 2 projected expenditures are $500,000 each but asks for costs for six different options. Does California expect that each option will be less than the projected expenditure of $500,000?	The proposed pricing should not go over $500,000. Proposers should explain what would be provided with each option.

Ques #	Questions	Answers
8.	During the conference it was stated that the 30 questions for 1,000 interviews is a proxy, and that you will assume that if it's 60 questions for 1,000 interviews that the cost is double. Did I understand this correctly? If yes, then depending on the type of survey (web, mail, phone, IVR), multiplying the cost by two for two times the number of questions, or dividing the cost by two for one-half the number of questions is not always applicable. Should we explain this in our cost justification?	The response to this question was misstated in the conference. Costs will be based on the Cost Worksheet; changes in survey questions, type of survey etc. will be negotiated as part of the work order process. These do not need to be addressed in the cost justification.
9.	What if I don't account for something in the cost proposal (Project Areas 1-3) such as oversampling or a different survey modality (phone, mail)?	Costs should be identified only as specifically requested in the Cost Proposal. Deliverables not clarified in the Scope of Work will be negotiated as part of the work order process.
10.	Exhibit B, Attachment 1: Where do we include the hours and costs for Project Area 4 – Technical Assistance?	Exhibit B, Attachment 1 has been revised to provide space for hourly rates and known costs. Please refer to Addendum 2, posted 09/07/17.
11.	Exhibit A, Statement of Work, G1-G3: How should we budget for tasks G1 – G3? Should we include these costs in the overall costs for Project Areas 1, 2, and 3?	This question is unclear as stated and we are unable to answer.
12.	Exhibit A, Statement of Work, G4: For budgeting purposes, what level of effort should we assume for these as-needed services?	The level of effort for these services is unknown at this time.
13.	How many companies received this RFP?	49 received the RFP. However, it is an open procurement and any company who meets the minimum qualifications can bid.

Ques #	Questions	Answers
14.	How did you source the bidders for this work?	This was done through consultations with internal and external partners, and online research.
15.	Why is Covered California searching for a new partner for this work?	The previous research contract ended in 2015 (see Background and Goals sections in the RFP).
16.	What date will vendors be notified if they qualify for Stage 2?	On September 22, 2017
17.	Is there any flexibility with regard to the timeline set forth in the RFP?	There is no flexibility. Proposers should adhere to the timeline provided.
18.	Does Covered California have a list of preferred vendors?	No.
19.	Is the expectation that each proposal stage is mailed to Covered California and received by the due date, or post marked by the due date?	Refer to Section IV. Submission Requirements, Item, C. Importance of Meeting Deadlines on page 24 in the RFP.
20.	Given that Covered California has gathered this data on their own in the past, what influenced the decision to release a Request for Proposal?	Covered California is seeking a contractor to provide strategic direction and coordination to address Covered California’s research needs and apply more rigorous methodologies. It will also solve the issue of the lack of internal bandwidth, tools and expertise.

Ques #	Questions	Answers
21.	What is the final date that RFP questions can be submitted?	The deadline to submit questions was August 25, 2017. We are no longer accepting questions.
22.	RFP states that the Project Lead must attend in person and staff listed in the staffing chart are expected to participate and may do so via webinar. Are all staff listed in the chart REQUIRED to participate? Will the proposer's evaluation score for the oral presentation be affected if a proposed team member cannot participate due to unexpected conflicts in schedule?	No, all staff do not need to participate in the oral presentation. Key personnel that demonstrate the breadth and capacity of the organization should participate. Please refer to Addendum 2, posted 09/07/17.
23.	We are not permitted to share the contract amount for other client work as requested in "attachment 7 Fact Sheet" – will leaving this information blank forfeit an opportunity to bid on work for Covered California?	If you cannot provide a specific amount due to a Non-Disclosure Agreement (NDA), please provide contract ranges.
24.	Is the residency requirement mandatory or is it more important to be able to get to Sacramento on a day's notice?	It is most important that the Project Lead can get to Sacramento on a day's notice as requested. It is expected the person will need to be on-site for a substantial amount of time for the first 3-6 months of the contract. Please refer to Addendum 2, posted 09/07/17.
25.	Is Covered California willing to work with a partner that does not have a project lead within the state of California?	See answer to question #5.
26.	Within Section E of the RFP, it states the following as a minimum required qualification – A project lead located in California with a minimum of five (5) years prior experience in managing tracking studies or quantitative research. We currently do not meet this requirement, however we have a ton of success serving partners around the globe with high quality	See answer to question #5.

Ques #	Questions	Answers
	and impactful quantitative (and qualitative) efforts without local staff, utilizing a purposeful combination of conference calls and in-person visits to effectively manage the initiatives, would you be willing to consider us in the absence of this requirement?	
27.	Attachment 10: Stage 2 Research Assignments states that ‘Proposers should only complete the Research assignment(s) for which they are proposing to fulfill themselves or through an identified subcontractor.” Can you confirm if proposers selected for Stage 2 can select which Research Assignments they want to respond to, or if the selection process at HBEX will inform proposers which assignments they are eligible to propose in Stage 2.	We’re looking for a full-service contractor and expect that proposals for Stage 2 would be for all project areas, whether fulfilled by the primary Proposer or a subcontractor. We encourage Proposers who are not full-service to partner with another organization to provide the best possible solution to Covered CA. If the successful Proposer cannot demonstrate the ability to address all areas adequately, Covered California would look to the strongest proposal to address a specific missing project area.
28.	Can we present more than one option for each Project Area?	No, Proposers may only submit one option for each Project Area.
29.	**RFP, Section I.E. Minimum Qualifications**: “Providing internet and/or telephone-based surveys” is listed as a primary area of expertise that proposers must demonstrate but later in the RFP it does not appear as one of the primary areas of expertise. How are proposers to address this experience/expertise?	Proposers should address experience and expertise in the narrative portion of the Stage 1 proposal. See pages 10-11 of the RFP for more details.

Ques #	Questions	Answers
30.	**RFP, Section II.B. 9) Proposer's Minimum Qualifications**: Our organization has significant experience in this area that goes back more than three years. We believe that reviewing this information is important to understanding our qualifications. If the Fact Sheet requires only projects from the last three years, is there another place where proposers can include relevant experience that has not occurred in the past three years?	See the answer to question #59.
31.	**Attachment 7-Fact Sheet and RFP Section I. E. Minimum Qualifications:** Requirements about "Minimum Qualifications" are unclear. Can Covered California please clarify whether proposers' client history to show minimum qualifications must demonstrate at least three years of experience or experience in the past three years? In **Attachment 7- Fact Sheet**, instructions say "*Complete the following tables that document the Proposer's client history in each Project Area during the past three (3) years, including 2017, as referenced in the Minimum Qualifications (**Section I.F. in the RFP**).*" **RFP Section I. E. Minimum Qualifications** says: "Proposers must have at least three (3) years of experience performing in one or more of the following areas…"	The Proposer must demonstrate three years of experience that should be documented in the narrative of the Stage 1 proposal. See pages 10-11 of the RFP for more details. Attachment 7 of the RFP refers to recent (past three years) activity. Subcontractors' experience can be used to help meet the qualification. Please refer to Addendum 2, posted 09/07/17.
32.	**Attachment 7-Fact Sheet:** Do the projects/contracts listed in each of the four areas have to be unique projects or can the same project be listed in more than one area if it is relevant to more than one area?	The same project/contract can be listed in more than one area if relevant.
33.	**RFP, Section II.B. 9) Proposer's Minimum Qualifications**: Our organization has significant experience in this area that goes back more than three years. We believe that reviewing this information is important to understanding our qualifications. If the Fact Sheet requires only projects from the last three years,	See the answer to question #59.

Ques #	Questions	Answers
	is there another place where proposers can include relevant experience that has not occurred in the past three years?	
34.	**RFP, Section II.C. 4) Client References and Attachment 13**: RFP says to include client references for projects "completed" in "past two years." Attachment 13 says to include references for clients "served" in "past three years." Can Covered California clarify whether the projects must have been <u>completed</u> or simply <u>active</u> in the timeframe of interest? Can you clarify whether the timeframe is past 2 or 3 years?	To clarify this issue, the Client References document should have stated that Proposers should list clients served in the past three years. Projects do not need to be complete in order to be listed as a reference. Please refer to Addendum 2, posted 09/07/17.
35.	**RFP, Section III.C. 2) Stage 2 Evaluation Criteria and Attachment 10**: Assignment 3 calls for description of TA to be provided. This is not called for the in the research assignment attachment (Attachment 10). Can you clarify whether we should speak to this in assignment 3?	Proposers do not need to speak to technical assistance in Assignment 3. The evaluation criteria in question will be moved from "Assignment 3" to the "Overall" category. Proposers should demonstrate their strengths and experience in technical assistance where applicable in their responses. Please refer to Addendum 2, posted 09/07/17.
36.	**Attachment 7- Fact Sheet:** If some of the work in a project area, but not the major portion, is to be completed by a consultant or subcontractor, is it expected that the proposer would check the "proposer-complete" box?	Yes.
37.	**Attachment 7-Fact Sheet:** Is the need for a subcontractor history form generated only if a subcontractor is completing a major portion of work in one or more of the areas?	Yes.

Ques #	Questions	Answers
38.	**Attachment 7-Fact Sheet, Part A. Proposer History and Ownership**: Question # 4- Sector Experience, refers to “marketing.” Would market research count within this term?	Yes.
39.	**Attachment 7-Fact Sheet, Part B. Proposer’s Size:** What is meant by “Proposer’s offices”?	The location (city, state, country) of the Proposer’s offices.
40.	**Attachment 13-Client References:** Is the need for a subcontractor client references generated only if a subcontractor is completing a major portion of work in one or more of the areas?	Yes.
41.	How will the partnership be managed on behalf of Covered California? Is there a primary point of contact that the awarded contractor will work with to address any questions related to this project?	Covered California will have a single point of contact (SPOC) and a back-up for each project area. Depending on how the contract(s) is awarded, there may be more than one SPOC.
42.	When listing out all potential subcontractors, can you please confirm whether or not we are to include sample recruitment partners, survey programming teams, translation agencies, etc., though they will not be completing any major portions of any project areas and are brought on for systematic purposes?	Proposers should include all known subcontractors who would complete a major portion of the specific Project Area. Stage 1 narratives on subcontractor experience are only needed for those who provide technical support to complete deliverables. The narratives can be less than the two-page maximum if appropriate.
43.	What is the name of the advertising agency (or agencies) that developed the advertising for Covered California?	Campbell-Ewald is Covered California’s multi-segment market advertising agency. They subcontract with Casanova-McCann for the Hispanic market, Intertrend for the Asian market and LAGRANT for the African-American market.

Ques #	Questions	Answers
44.	Can Covered California provide: • information from the advertising agency (or agencies) about the intended reach of their media and media buys? • access to the timing of the ads in TV and Radio? results of any past evaluations of the reach and effectiveness of their efforts?	Not at this time. Information regarding advertising efforts will be provided as part of the new contractor onboarding process.
45.	Attachment 12 states: "Covered California will not provide compensation for operating expenses and overhead, such as space rental or lease, office expenses/supplies, communications, postage, equipment rental or purchase and indirect costs." Are there any exceptions to this for university entities that are located off the main campus and assume the full costs of overhead, operational, and indirect expenses?	No, exceptions for university entities are not permitted for this procurement.
46.	Are there any conflict of interest restrictions that would preclude the involvement of subcontractors who are engaged in advocacy work related to Covered California quality improvement?	Unfortunately, we cannot provide a specific answer to this question as any conflict of interest issues will be reviewed on a case-by-case basis.
47.	Related to Attachment 7 Section D, item 5: the solicitation references the term FTE. Do you mean full time employees working on contract or do you mean full time equivalent hours on a project?	FTE refers to the full time equivalent hours worked on a project. Please refer to Addendum 2, posted 09/07/17.
48.	Can you describe in general terms your anticipated ad buy – will it be both traditional (TV, print, etc.) as well as digital? How do you handle digital analytics?	Our ad placement is approximately $36 million per year concentrated during the Open Enrollment period. It is a combination of traditional and digital media. We collect digital analytics via Google analytics and other tools from our advertising agencies.

Ques #	Questions	Answers
49.	Are VA/DoD/Govt security clearances acceptable or do they still have to go through a CA background check?	Anyone who has access or possesses Personally Identifiable Information (PII) or Protected Health Information (PHI) from Covered California members is required to have a background check. Proposers will need to decide who will access or possess the data and get a background clearance for them. We have high privacy standards and using other government clearance protocols will be determined on a case-by-case basis.
50.	Attachment 1, the cover page, should this be the first page of the proposal, or can this go after our proposal cover?	Your cover can come first. Whatever presentation best for you. We need to see Attachment 1 quickly, but you can place your cover first. Please follow the format and maintain the sequence of Attachments and requested documents.
51.	Can you talk a little bit more about Form 700? Is this at a company level or for all individuals involved? And if the latter, is it for the internal team, project lead only, contractors and additional admin. Elements within the company such as survey programmers, finance teams, etc.?	The Form 700 is required for anyone who is determined to be a "Code Filer." Covered California's conflict of interest policy prohibits state employees and consultants from participating in decisions that may materially affect their financial interests. Consultants and their key staff who participate in making a government decision as defined in 2 CCR § 18700 are considered "Code Filers" and must complete Form 700s prior to commencing any work on the contract. For more information, please visit the California Fair Political Practices Commission website at http://www.fppc.ca.gov/the-law.html.
52.	Vendors like translators, data processors, charting teams…should all be considered subcontractors meaning they require 2 page narratives as well?	Proposers should include all known subcontractors who will play a major role in any Project Area. It is not required to use an entire two pages per subcontractor if it is not needed. Proposers are encouraged to be as concise and clear as possible.

Ques #	Questions	Answers
53.	Is funding for any part of this work already appropriated and approved by the State? If not, when will it be?	Yes, $2.5 million has been approved for FY17/18.
54.	Does the model contract contain all the pertinent contracting language?	Yes.
55.	Are reviews or suggested modifications considered for any of the attachments or exhibits, or are any suggested changes terms for disqualification?	No. While changes to the Model Contract can be considered, excessive changes that materially alter the parties' rights and responsibilities will not be considered.
56.	RFP, page 5, Contract Amount section states 'funding amount for each year of all awarded contracts is $2,500,000. Was any ad-hoc, custom work executed in 2016?	All work executed in 2016 was ad hoc since there was not a research contract in place.
57.	If the contract is signed later than November 1, 2017, will due dates for the deliverables shift accordingly?	The goal is to have surveys in the field in Spring 2018 so a delayed start would necessitate compacting the due dates.
58.	As it stands, the current compliance requirements and flow-downs present a significant issue with Survey Sampling International with signing the contract as-is. An example being the protections within the limitation of liability. Would any changes or edits to the contract, proposed by the contract, be a non-starter?	Specific changes to the Model Contract will not be discussed during the Question and Answer process. The successful Proposer should raise any issues during contract negotiations. Covered California will consider redlines to the Model Contract, but will not consider excessive changes that materially alter the parties' rights and responsibilities.

Ques #	Questions	Answers
59.	(Refer to #44 above) If not, is there any room to negotiate and suggest edits, and still be rated as a ‘superior’ candidate for the work proposed?	See answer to question #44.
60.	(Refer to #44 above) Could you provide examples of areas in the contract that are non-negotiable or ‘off-limits’ to potential edits?	See answer to question #44.
61.	Exhibit A, SOW, Section G, Project Area 4 – Technical Assistance: Project Management, Research Planning, Additional Surveys and other Services (#2 regarding consultation) – Does Covered California expect support under item #2 to be limited only to consultation/advisory services providing advice to improve and maximize quantitative research efforts? Or does Covered California need support to actually plan and execute activities such as facilitating strategic planning sessions?	Covered California desires technical assistance with its overall research plan for all current and future surveys, including input on strategic planning, design, implementation and analysis.
62.	Exhibit A, SOW, Section G, Project Area 4 – Technical Assistance: Project Management, Research Planning, Additional Surveys and Other Services (#9 Progress Reports and Meetings) – Item B – what intervals/frequency does Covered California anticipate for updates of open projects, work orders and timelines, and interim findings and problems encountered with suggested remedies? What format works best for Covered California (e.g. meetings, written report, both)?	The Contractor(s) would be responsible for providing weekly status reports in-person or by phone. Covered California will collaborate with the Contractor(s) to come up with templates for all reports.
63.	(Refer to #55 above) Item C – what frequency does Covered California anticipate for the ongoing meetings to present findings, conclusions, and comprehensive final reports?	Dates and frequency of meetings to present findings and final reports will be negotiated with the successful Proposer on an as-needed basis.

Ques #	Questions	Answers
64.	Hold ongoing meetings at which Contract shall present findings, conclusions and comprehensive final reports of efforts and recommendations on how learnings could be applied moving forward. Are ongoing meetings expected to be in person or can they be via phone/webinar? Are these meetings annual?	See answer to questions #55 and #56. Covered California does not currently have annual meetings.
65.	What are your expectations and desired format for research deliverables?	It varies by project and would be detailed and agreed upon in a work order prior to work commencing.
66.	Attachment 12 defines the 'current projected annual budget expenditure' for Area 1, Area 2, and Area 3 as $500,000, $500,000, and $400,000 respectively. No budget expenditure is provided for Area 4. How do the budget figures in Attachment 12 and RFP page 5 align?	The total annual budget is $2.5 million. The amount used for Project Areas 1, 2 and 3 totaling $1.4 million in the RFP should be used in your response. The remaining annual budget of $1.1 million has been reserved for Project Area 4 which includes Technical Assistance and other projects as needed. During negotiations and throughout the contract these amounts may increase or decrease based on needs of Covered California and fine tuning of the deliverables.
67.	Page 5, F. Contract Amount. The RFP states that the total funding for each year of the project is $2,500,000. Attachment 12 lists the budgets for the first 3 Project Areas with a total of $1,400,000 ($500,000 for Project 1, $500,000 for Project 2, and $400,000 for Project 3). Is the remaining $1,100,000 for Project Area 4 – Technical Assistance, or is it for additional work?	See answer to question #17.
68.	**Exhibit A, SOW**: Can Covered California confirm that the TA and other research being contemplated in Area 4 is related to <u>market</u> research/evaluation and not broader research and evaluation topics/needs? Also, can you indicate whether the TA and other research will be focused primarily on customer/member satisfaction needs (which could be one	As deliverables for Project Area 4 are unknown, the full scope of research activity is still undefined, but it will include market research, consumer satisfaction, and broader research as needed. Proposers should include both loaded hourly rates for key personnel and known additional costs as applicable.

Ques #	Questions	Answers
	interpretation of its reference in the Stage 2 evaluation criteria box on Assignment 3 in the RFP)?	
69.	**Attachment 10-Stage 2 Research Assignments:** There is no research assignment for Project Area 4 “Technical Assistance in Project Management, Research Planning, Additional Surveys and Other Services”. The RFP seems to ask for TA plans to be addressed in the narrative speaking to Covered California’s research needs (per description in RFP Section II.B.11) and in Assignment 3 (per description in RFP Section III.C.2 “Stage 2 Evaluation Criteria,” “Assignment 3: Member survey narrative”). Can Covered California please clarify where proposers should speak to Project Area 4?	There is not a specific assignment for Project Area 4 “Technical Assistance”. In general terms, proposers may speak to Project Area 4 in the Stage 1 narratives, Fact Sheet and the Agency Staffing Chart. In Stage 2, Proposers may discuss these as they potentially relate to the assignment and cost proposal.
70.	Can you please elaborate on what the request in Project Area 4 “Technical Assistance” would entail in more detail? Points 2-4 in particular, summarized below: • Provide consultation to improve and maximize Covered California’s quantitative research efforts, and the strategic planning, development, and implementation of its evaluation activities. • Assist in evaluating and revising existing surveys in the context of other proposed research, and develop and implement new surveys to evaluate aspects of the consumer experience (i.e. satisfaction measures). At Covered California’s discretion, provide as-needed services in support of research efforts that are within the contract’s SOW but are not explicitly addressed.	See answer to question #66. Project Area 4 deliverables are not yet specifically defined. We do not have additional detail to provide at this time.

Ques #	Questions	Answers
71.	**Type of Contract**: Can Covered California please clarify what type of contract this will be? Is this a fixed labor rate type of contract?	The contract will consist of approved hard costs and fixed labor costs.
72.	What is Covered California's process to define and communicate any changes in scope?	Project deliverables (new and revised) will be approved via work orders prior to any work commencing.
73.	What are the expected delivery dates for each study listed in the Scope of Work?	Covered California expects to field studies listed in the SOW in Spring 2018 (immediately following Open Enrollment). Due dates for final reports will be coordinated with successful contractor.
74.	Given the breadth of the SOW, it is anticipated the selected Proposer(s) may need to subcontract with one or more organizations with demonstrated knowledge, experience, and capacity to fulfill the required project areas that the Proposer cannot. If the Proposer does not have the full-service capabilities to effectively address all project areas of the SOW, they must identify one or more proposed subcontractors to fulfill the remaining SOW areas. Covered California reserves the right to deny any proposed subcontractor of the selected Proposer(s). Posting the "Notice of Intent to Award" does not imply Coverage California's approval of proposed subcontractors, if any are named in the selected Contractor's proposal. Do subcontractors need to be US-based? What criteria is considered when evaluating a subcontractor?	The RFP does not restrict non-U.S. based subcontractors. However, contractual requirements (e.g. privacy/data security) should be considered and will need to be discussed on a case-by-case basis. Criteria for subcontractors are specified in Section III.C. of the RFP, Subcontractor Capabilities and Experience.
75.	At Covered California's discretion, provide as-needed services in support of research efforts that are within the contract's SOW but are not explicitly addressed. These services may include, but are not limited to: i. Qualitative research (e.g. focus groups);	At this time, we cannot provide an estimate of either frequency or complexity of these potential requests. All services would be

Ques #	Questions	Answers
	ii. Different modalities of data collection (e.g. intercepts, text); iii. Ad-hoc requests for research and/or data; and, iv. Consultation on research projects. Could they provide an estimate of the frequency and/or complexity of ad hoc/consultation requests?	requested based on an approved work order prior to work commencing. See Exhibits B and C for details.
76.	Upon Covered California's request, Contractor shall perform the following specialized programs: Provide as-needed services that are within the contract's SOW but are not specifically addressed in the RFP. Could you provide an estimate of the frequency and/or complexity of specialized programs? Or examples of such programs?	Specialized programs will be used when a deliverable is requested that is not listed in the Scope of Work but would achieve a research goal for Covered California. Examples include, but are not limited to: telephone IVR survey, or shorter surveys/polls based on consumer transactions. The frequency is not known at this time.
77.	Exhibit B, Attachment 1: Where do we include the hours and costs for Project Area 4 – Technical Assistance?	At this time, we cannot provide the number of hours needed for Project Area 4. All services and number of hours will be agreed upon and approved by work order.
78.	Exhibit A, Statement of Work, G1-G3: How should we budget for tasks G1 – G3? Should we include these costs in the overall costs for Project Areas 1, 2, and 3?	This question is unclear as stated and we are unable to answer.
79.	Exhibit A, Statement of Work, G4: For budgeting purposes, what level of effort should we assume for these as-needed services?	The level of effort for these services is unknown at this time.[JR(1]
80.	How are the current surveys administered?	Awareness tracker: The last awareness survey was conducted in 2015 and was computer assisted telephone interview/random digit dial. Ad tracker: The ad tracker would be a new survey – therefore, it has never been administered.

Ques #	Questions	Answers
		Member survey: The member survey was a random sample from the Covered CA database, email invitation to online instrument.
81.	Would we have access to the data from 2015/2016?	During the onboarding process, we will provide relevant data to the successful Proposer. All publicly released data can be found here: http://hbex.coveredca.com/data-research/
82.	Are there any additional data sources available that could be used to inform the analysis or provide further context to the insights?	All data sources can be found in publicly released data located here: http://hbex.coveredca.com/data-research/
83.	Tracking Study report from 2015 indicates that the survey instrument covers both Branding topics and Advertising topics. Does a single questionnaire address both Area 1 and Area 2, or are these separate questionnaires?	The prior tracking survey incorporated knowledge of awareness and ad measurement. Our goal is to have a more focused awareness tracker and more focused ad tracker. Covered California will work collaboratively with the successful Proposer to determine whether one questionnaire or separate questionnaires would be appropriate.
84.	**Stage Two Assignments/Budgeting**: Is it possible to propose fielding the consumer tracking brand awareness/attitudes and advertising impact studies together at the same time? Or, does Covered California desire that these be two completely separate survey projects from a data collection standpoint?	For purposes of the Stage 2 assignments and budgeting, your responses should incorporate two separate survey projects from a data collection standpoint. For more information on this topic see answer to question #19.
85.	If the Tracking Study report reflects topics for Area 1 only, may we see a questionnaire or report from Area 2?	There hasn’t been a comprehensive ad tracker previously. Going forward, the ad tracker would be a new survey.

Ques #	Questions	Answers
86.	Ethnic mix: The Final Report dated October 22, 2015 (Overview of Main Findings from the Third California Affordable Care Act Consumer Tracking Survey) specifies oversample of Asians and African Americans. Will this be the case for the upcoming program?	In the future, oversamples of different consumer segments may be requested of the successful Proposer.
87.	Language: What definition is used to identify Spanish dominant?	A Spanish-dominant person speaks and consumes the Spanish language the majority of the time.
88.	Geographic Area: Attachment 12 lists target DMAs to include, but not limited to LA, San Francisco, Sacramento, San Diego, Fresno – please provide list of all DMAs used in most recent study.	We cannot provide a list of all DMAs used in the most recent study as we did not use DMAs.
89.	Project Area 3 – Covered California Member Survey – Methodology: What method was used in 2016 for Area 3?	The member survey was a random sample from the Covered CA database, email invitation to online instrument.
90.	Data Collection platform: Attachment 10 refers to ‘responses collected in Covered California’s Customer Relationship Management software system’ – please name and describe the system.	Covered California’s current survey functionality is housed in the Oracle Right Now! Customer Relationship Management (CRM) Service Cloud.
91.	(Reference #28 above) – Please confirm that an outside agency can gain access to use/control the system.	No, an outside agency cannot gain access to use/control the system. Covered California maintains control of this functionality.
92.	How many questions in tracking study were included in 2016?	There was no tracking study conducted in 2016, only the Member Survey.

Ques #	Questions	Answers
93.	For Project Area 1 and Project Area 2, can you clarify whether there are existing questionnaires that will be used as the basis for these project areas, or will questionnaires need to be created? (i.e., review/evaluate existing survey)	We have existing instruments for Project Areas 1 and 3 (Awareness Tracking Survey and Member Survey), however, new questions may need to be created as well. Refer to SOW, Section C.1. There are no previous questionnaires for Project Area 2 as this will be a new survey.
94.	For the questionnaires for Project Area 1 and Project Area 2, is there an LOI that we can base costing on? The number of questions provides some guidance but any additional information would be appreciated.	No, there is not a LOI on which to base costs.
95.	For Project Area 1, there is no indication of total waves preferred, can some guidance be provided here on Covered California expectations?	At this time, it’s expected on an annual basis, there will be one Awareness Survey, one Ad Tracker and one Member Survey each conducted immediately after Open Enrollment. The frequency of waves may change in the future.
96.	For Project Area 2, there is no indication of total waves preferred, can some guidance be provided here on Covered California expectations?	See answer to question #37.
97.	Field surveys at the appropriate time (i.e. post renewal and open enrollment periods, or following a specific consumer action). Given this requirement, surveys are currently fielded annually? If not, what is the current frequency of each?	See answer to question #37.
98.	For Project Area 3, can you clarify what is the typical response rate for Covered California membership surveys?	Roughly 2% as stated in Attachment 10.
99.	In Project Area 3, what is the difference between Member Survey using Covered California delivery and survey tools and Member Survey using Proposer’s delivery and survey tools?	The decision to use Covered California’s survey tools or the Proposer’s survey tools will be based on the need of the contractor to access personal information and the status of the successful Proposer employee’s background clearance issues.

Ques #	Questions	Answers
		The difference would be whose system delivered a survey invitation and hosted the online survey.
100.	For Project Areas 1, 2 and 3 there are no clear deliverable milestones for each of the project areas, can you elaborate? In other words are there key dates in the year when key metrics should be presented to Covered California?	It is anticipated that the successful Proposer will be responsible for releasing an Ad Tracker, Awareness Tracker, and Member Survey in Spring 2018. Future timing of deliverables will be agreed upon by Covered California and the successful Proposer. Refer to SOW, Sections C-G, in the RFP for additional details.
101.	For Project Area 4, can Covered California provide some further explanation as to the scope and frequency of projects? Are the projects evenly spaced during the year, or are two or three projects expected to be managed in a short period of time?	At this time, Project Area 4 is undefined in terms of scope and frequency.
102.	Does Covered California have expectations for the sample sizes for each of the 3 surveys?	Generally, yes. Covered California stated expected sample for the Trackers and the member survey in the Stage 2 Assignment and Cost Proposal (Attachments 10 & 12). Once the successful contractor sample sizes will be more accurately determined given the scope of each survey.
103.	Can Covered California provide any information about languages other than English and Spanish for the 3 surveys. Any expectations about specific language needs or the number of other languages expected would be helpful.	Our primary response languages are English and Spanish. We may include additional languages in the future but have no specific information at this time.
104.	What are your language needs and requirements associated with research?	Our primary response languages are English and Spanish. See answer to question #48.

Ques #	Questions	Answers
105.	Exhibit A, SOW, Section F, Project Area 3 – Covered California Member Survey – In general does Covered California want to prioritize specific segments of the population within the sample plan?	Yes, Covered California does, in certain cases, prioritize segments to ensure a representative sample of sub-groups.
106.	(Refer to #51 above) Can Covered California indicate initial thoughts regarding how often sampling should occur to ensure adequate response rates?	Our initial thoughts are we should sample at least once a year. We expect the successful Proposer to recommend the most appropriate methodology to ensure adequate response rates.
107.	(Refer to #51 above) What timelines are under consideration for sampling and fielding the survey?	We are expecting to conduct an Awareness tracker, Ad Tracker and Member Survey in Spring 2018.
108.	The RFP contains little discussion of requested deliverables, though did not provide an example report for the Tracking Study. Does the Tracking Study report represent the desired report style for Area 1, Area 2 and Area 3?	Refer to SOW, sections C-G. Specific deliverable details will be collaboratively developed and confirmed via work order including an appropriate reporting style.
109.	What other output or deliverables may be required? (see info in #15 above)	No other deliverables are required to respond to the RFP, however other deliverables may be requested during the contract. See SOW, section 5, Specialized Programs, for more details.
110.	Methodology: The Tracking Study report from 2015 indicates that methods was telephone, but online panels are referenced throughout the RFP. What method(s) was used in 2016 for Area 1 and Area 2?	In 2016, an ad hoc awareness study (Area 1) was conducted by Covered California's advertising contractor. This study was an online recruitment and survey. There was no advertising study in 2016 (Area 2).
111.	Target Age: Attachment 12 defines recruitment parameters of ages 26-54. The Final Report, dated October 22, 2015 (Overview of Main Findings from the Third California Affordable	As stated in the RFP, the age range is 26-54.

Ques #	Questions	Answers
	Care Act Consumer Tracking Survey) includes respondents aged 18-64. Clarify target respondent age.	
112.	(What was the length of the phone survey in minutes?	The 2015 phone survey was approximately 25 minutes.
113.	Does Covered California have an expectation regarding the length of the final report(s)?	No.
114.	Does Covered California have a preferred format for the final deliverable(s)?	No. This may vary depending on the project.
115.	Has Covered California previously leveraged external panel providers for the consumer tracking or member surveys?	No.
116.	General Information – Research Background, Member survey: In 2015 and 2016, Covered California fielded membership surveys using its own staff and available survey technology (see Attachment 11 for the 2016 survey instrument). It is anticipated that the selected Proposer(s) will begin leveraging the existing instrument and possibly the delivery mechanism, at least initially. At the onset on the project, is there any opportunity to modify the member survey currently in use or do the survey results need to trend?	We prefer that results trend, but we recognize the need to be flexible. We expect the successful Proposer will recommend that the survey be modified over time.

Ques #	Questions	Answers
117.	Member survey: In 2015 and 2016, Covered California fielded membership surveys using its own staff and available survey technology (see Attachment 11 for the 2016 survey instrument). It is anticipated that the selected Proposer(s) will begin leveraging the existing instrument and possibly the delivery mechanism, at least initially. If required to continue using the current survey tool is the process simply provide the survey link for us and we would field? What platform are you currently using? Is there timing you are thinking of for when the project would transition to our survey tool?	We are currently using the Oracle Right Now! Service Cloud platform. The project would be transitioned to the successful Proposer upon completion by the successful Proposer of Covered California's privacy requirements.
118.	Since 2012, Covered California has conducted a variety of consumer research studies with the intent of providing insight into improving outreach and the consumer experience. These studies have included both quantitative and qualitative research and have examined consumer behavior, pricing, health plan choice, messaging and creative testing. Two projects relevant to the current RFP are described below; with a link or attachment to examples of each. The RFP mentions providing access to the 2014-15 tracking studies and 2015-16 member survey, will you share other relevant research conducted as well?	During the onboarding process, we will provide relevant data to the successful Proposer. All publicly released data can be found here: http://hbex.coveredca.com/data-research/ and in the RFP, Attachment 11.
119.	Tracking studies: Since 2013, Covered California has sponsored a series of marketplace tracking studies to assess changes in consumer awareness and knowledge about the ACA and Covered California, as well as the effects of exposure to advertising, earned media and outreach efforts. For the consumer tracker surveys, do you currently utilize a panel or members? Could we include both a panel and a subset of members so you have both feedback from the general population and members? If a panel is used, are there any	For tracking studies in the past, we have not used members. The inclusion of members as part of a panel would be subject to negotiation with the successful Proposer. We do not have further information to provide at this time.

Ques #	Questions	Answers
	restrictions or required sub-groups that we would need to include or does it simply need to be representative of the CA population? What were the qualifications to be included in the consumer trackers? Can you tell us the incidence?	
120.	Member survey: In 2015 and 2016, Covered California fielded membership surveys using its own staff and available survey technology. For the member survey, will you be able to provide sample that would include, first/last name, email address? If it is your database, could you also provide additional data fields like how long a member, plan type, ethnicity, race, city, how many family members on plan, etc. for potential segmentation	All agreed upon data will be provided to the successful Proposer upon completion by the successful Proposer of Covered California's privacy requirements. The variables will be used for segmentation purposes.
121.	Tracking studies: Since 2013, Covered California has sponsored a series of marketplace tracking studies to assess changes in consumer awareness and knowledge about the ACA and Covered California, as well as the effects of exposure to advertising, earned media and outreach efforts. Member survey: In 2015 and 2016, Covered California fielded membership surveys using its own staff and available survey technology. Can you provide a breakdown how each of the surveys were distributed - what was the number of completed surveys via phone, via email, via any other modes?	See the answer to Question #9. We will provide the number of completed surveys to the successful Proposer when appropriate.
122.	Field surveys at the appropriate time (i.e. post renewal and open enrollment periods, or following a specific consumer action).	Yes, Proposers can explore and discuss this idea in their RFP response.

Ques #	Questions	Answers
	For specific interaction/consumer actions (e.g., changes to the member plan) could this be a separate, shorter survey that would go out post change? This is something we could text out to supplement the annual survey.	
123.	Will each of the 3 surveys be conducted simultaneously throughout the calendar year?	It is likely that the 3 surveys will be conducted simultaneously due to our Open Enrollment cycle.
124.	Attachment 12, Project Area 3, states *"Options (1) and (2) differ in that the online tool used for survey delivery is either the proposer's or Covered California's."* Can you clarify that the only difference between the two options is that with Option 1 Covered California is responsible for programming, testing, hosting, and maintaining the online survey, and with Option 2 the contractor will be responsible for these tasks? Are there any additional differences between Option 1 and Option 2?	Yes, the difference between the two options is correct. It is possible that the contractor may assist with testing the survey instrument in Option 1. In both options, the contractor would be responsible for data analysis and reporting.
125.	Is Covered CA open to suggestions in modifying the Member Survey to also include some of System1 Research's key metrics in efforts of better understanding Covered CA's members?	We are not recommending or encouraging any proprietary metrics be used.
126.	How many waves of each project area/assignment (brand tracking, ad testing and member survey) are anticipated per year?	At least one annually starting in Spring 2018. See answer to question #37 for more information.
127.	Are there any restrictions on the extent to which revisions can be made to the content of existing data collection tools?	No, there are no restrictions. One of the areas of technical assistance is providing strategic input for data collection and processes, which could result in revisions.

Ques #	Questions	Answers
128.	Exhibit B, Attachment 1 seeks for separate cost information for the member survey under two assumptions: “using Covered CA delivery and survey tools” and “using proposer’s delivery and survey tools”. Can Covered California provide more details about what specific components, systems, and services Covered CA would provide under the “using Covered CA delivery and survey tools” approach?	Using the “Covered CA delivery and survey tools approach”, Covered California would send the invitation by email and host the online survey. This is the method we would use if the successful Proposer were unable to address all privacy issues.
129.	SOW, Project Area 1 and Area 2 – Looking at the report from NORC - It looks like Project Areas 1 & 2 were combined, conducted with one survey instrument? • I see the survey questions, but instead of guessing the length of survey, do you have this info? The length of survey as it was conducted in field. • Do we have an incidence figure for the percentage qualified to participate given a random sample? Do you expect it will be any higher or lower at present? • How are the following categorized and are they included in the survey: those that purchase insurance through an employer where the employer pays part of the insurance premium, but not completely? • What was the sample size for the main survey and then oversample for the African Americans and Asians? • What type of sampling was used for the African American and Asian oversample? What Asian languages were offered?	It is not in the best interest for Proposers to follow the methodologies in the NORC survey, as it was included in the RFP to illustrate prior work. For your proposal, follow the instructions in the RFP and its attachments. We are unable to provide the specific information requested.
130.	SOW, Project Area 3 – • I couldn’t find a report for the member survey. Where can I find to fully understand previously used methodology?	There was no overall report on the member survey. The member survey was done through an email invitation with one follow-up email to non-respondents.

Ques #	Questions	Answers
	• Was email followed up with telephone or mail? Both? Can you verify. How many were completed by each method? • I see the Active Members profile with number of current enrollees, but how many members have email addresses? How long was the member survey?	There were approximately 10,000 completed surveys in 2016. We have emails for roughly 60% of members. See Attachment 11 in the RFP for more detail as to the length of the survey.
131	“Related to the Covered California survey system for the member survey: Is it capable of telephone follow up?”	No, not at this time.