

**DEPARTMENT OF INSURANCE**

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**REQUEST FOR OFFER**

**RFO #: 17003**

For:

Matchmaking Services

You are invited to review and respond to this Request for Offer (RFO). To submit an offer for these services, you must comply with the instructions contained in this document as well as the requirements stated in the State's Scope of Work (SOW), Attachment A, and Minimum Requirements, Attachment B. By submitting an offer, your firm agrees to the terms and conditions stated in this RFO.

Read the attached document carefully. **The due date for response to this RFO is: May 24, 2017.** Responses to this RFO and any required documents may be submitted by electronic mail or regular mail, clearly labeled to the department contact noted below.

**Department Contact:**

Mark Valim  
California Department of Insurance  
300 Capitol Mall  
Sacramento, CA 95814  
Phone (916) 492-3413  
Fax (916) 327-7676  
[Mark.Valim@insurance.ca.gov](mailto:Mark.Valim@insurance.ca.gov)

## **GENERAL INFORMATION**

### 1. BACKGROUND AND PURPOSE OF THE RFO

The California Department of Insurance (CDI) is seeking a **California (CA) certified Small Business (SB), Micro Business (MB), Nonprofit Veteran Service Agency (NVSA), or Disabled Veteran Business Enterprise (DVBE) matchmaking vendor (Contractor)** to provide matchmaking services for the following one event held by the Insurance Diversity Initiative (IDI) as described herein:

a. **6<sup>th</sup> Annual Insurance Diversity Summit**

The goal of the Diversity Summit is to provide a space where insurance procurement representatives and diverse businesses (minority, women, disabled veteran, and LGBT-owned businesses) can network and discuss potential business partnerships. The purpose of the Summit's matchmaking session(s) will be to connect insurers and diverse businesses via short, one-on-one meetings. These meetings will be strategically setup based on the procurement needs of insurance companies and the types of goods and services each diverse business can provide. The Insurance Diversity Summit will take place November 28, 2017, at California State University, Sacramento (CSUS) in Sacramento, CA.

Additional details are provided in "Attachment A – Scope of Work".

### 2. KEY DATES

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

<u>Event</u>	<u>Date</u>
1. Release of RFO	05/08/17
2. RFO Response Submission Due Date	05/24/17
3. Review of RFO Submissions	05/26/17

### 3. RFO RESPONSE REQUIREMENTS

This RFO and the Offeror's response to this document will be made part of the ordering department's STD 213 contract and procurement contract file.

Responses must contain all requested information and data and conform to the format described in this section. It is the Offeror's responsibility to provide all necessary information for the State to evaluate the response, verify requested information and determine the Offeror's ability to perform the tasks and activities defined in the State's Scope of Work, Attachment A, Minimum Requirements, Attachment B, and Cost Worksheet, Attachment C, Bidder Declaration & Commercially Useful Function (CUF) Evaluation, Attachment D, provided as required below.

The Offeror must submit 2 copies of their response via e-mail or hard copy to the department contact name and address contained on the cover sheet to this RFO.

Departments must offer procurement opportunities to California (CA) certified Small Business (SB), Micro Business (MB), Nonprofit Veteran Service Agency (NVSA), and Disabled Veteran Business Enterprise (DVBE), whenever possible. See attached Bidder Declaration (GSPD 05-105) to allow suppliers to identify if they are a SB, MB, NVSA, or DVBE and identify SB, MB, NVSA, or DVBE subcontractors, their proposed contract function and the corresponding percentage of participation.

Click here to access the [Bidder Declaration Narrative](#).

Click here to access the [Bidder Declaration, GSPD 05-105 – Written Version](#).

#### Darfur Contracting Act Certification

Pursuant to Public Contract Code sections 10475 through 10481, for acquisitions of non-IT goods or services, State agencies must require vendors to certify whether they are a scrutinized company. Please complete the Darfur Contracting Act Certification if your company **has** had any business activities or other operations outside of the United States within the previous three (3) years.

#### Bidder Declaration & Commercially Useful Function (CUF) Evaluation

If you are a Micro Business, Small Business, or Disabled Veteran Business owner providing a bid, you must complete and return a Bidder Declaration as well as complete and sign the CUF evaluation. (Please see Attachment D).

#### 4. RFO RESPONSE CONTENT

The majority of the information required to respond to this RFO is contained in the State's Scope of Work, Attachment A, Minimum Requirements, Attachment B, and Cost Worksheet, Attachment C.

##### a) Response to State's Scope of Work, Attachment A:

The Offeror's "Statement of Work" responds to the State's Scope of Work and will be used to evaluate responsiveness to requirements. This Statement of Work response must map each task/deliverable item back to the Attachments. The response must include any additional information that the Offeror deems necessary to explain how the Offeror intends to meet the State's requirements. The Statement of Work needs to contain the following as appropriate:

1. Overview of the required tasks and outcomes.
2. Description of how the tasks will be performed.
3. Work plan for each task, including sub-task description, including due date for each deliverable.
4. Evidence of meeting "Minimum Requirements" as stated in Attachment B.
5. Response to Attachment C.

5. CONTRACT AWARD

Award of a contract resulting from this RFO will be based on a lowest bid meeting Attachment B, Minimum Requirements.

6. REVIEW OF OFFERS FOR AWARD

Responses to this RFO will first be reviewed for responsiveness to all requirements of Attachments A and B, and any other Attachments. If a response is missing information required in any Attachment it may be deemed not responsive.

## **ATTACHMENT A**

### **SCOPE OF WORK**

#### **A. SCOPE AND DESCRIPTION**

Contractor agrees to provide services as described herein:

##### **a) INSURANCE DIVERSITY SUMMIT**

Services will be provided in six phases:

- (I) Consultation and Discussion of Diversity's Matchmaking Needs;
- (II) Development, Setup and Hosting of Online Registration Portal;
- (III) Registration Support to Matchmaking Participants and CDI Staff;
- (IV) Coordinating and Scheduling Matchmaking Meetings;
- (V) On-site Support at Insurance Diversity Summit; and
- (VI) Post-Event Debriefing

The six phases of services needed are described in greater detail below:

##### Phase I: Consultation and Discussion of Diversity's Matchmaking Needs

In consultation with Insurance Diversity Initiative (IDI) staff, Contractor will collect information regarding IDI's matchmaking needs for the Insurance Diversity Summit. This includes a discussion of the relevant categories that will be the basis for matchmaking such as: 1) Insurance Procurement Representative; 2) Minority Business Enterprise (MBE); 3) Women Business Enterprise (WBE); 4) Disabled Veteran Business Enterprise (DVBE) or Veteran Owned Business Enterprise (VOBE); and 5) Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE). Contractor will work with IDI staff to determine how strategic matches will be made, discuss how the online portal will be setup and used, develop the specific process by which insurers and diverse businesses signup and register for the matchmaking session and submit relevant documents, delegate clearly the tasks between the Contractor and IDI staff, and propose a detailed timeline of work to be completed leading up to the Summit date of Tuesday, November 28, 2017, and the debriefing that will follow afterwards. The deadline for work to be completed for this phase is Friday, September 15, 2017.

##### Phase II: Development, Setup and Hosting of Online Registration Portal

Contractor should be able to create both a website and online registration portal. This portal should be easy to use and be monitored daily by Contractor to ensure that it is working effectively. Mirror level of access of the website and registration portal should be available to IDI staff. This portal will be customized based on the matchmaking needs expressed by IDI staff and will provide industry relevant categories regarding the procurement needs of insurers. In addition to the function of basic event registration, the website should allow matchmaking registrants to: 1) create a profile that describes their organization, including abilities and needs; 2) provide proper contact information for at least two points of contact; 3) view the profiles of other registrants; 4) login to view their specific profile, coordinate meetings, and other information; 5) allow registrants that are

diverse suppliers to upload/submit capability statements as part of their profile and 6) any other tools that help registrants as they prepare for the matchmaking session on the day of the Summit. The online portal will also be used for general registration purposes for event attendees who are *not* participating in matchmaking.

The website and online registration portal should be mobile accessible (i.e. on cell phones, tablets, etc.). The deadline for work to be completed for this phase is Friday, September 29, 2017, so that attendees may begin to register for the Summit and matchmaking on Monday, October 2, 2017.

### Phase III: Registration Support to Matchmaking Participants and CDI Staff

Contractor must provide a designated contact that is readily available by both e-mail and phone to answer questions from insurers, diverse businesses, and CDI staff regarding the online registration portal. It is expected that Contractor will both provide support during the registration process and also troubleshoot issues that may arise. The deadline for participants to register for matchmaking will be Monday, October 30, 2017, so that Contractor may begin coordinating and scheduling matchmaking meetings in conjunction with the insurers. General registration for the Summit will stay open until Wednesday, November 22, 2017, and continued registration support will be needed until the day of the Summit.

### Phase IV: Coordinating and Scheduling Matchmaking Meetings

Once matchmaking registration has closed, Contractor must use the information provided by the registrants to strategically match insurers to diverse businesses based on the information provided by the insurers. When matches have been made, Contractor will work directly with insurers and diverse businesses to schedule meetings that work for both parties and allow adequate time for rest in-between matchmaking sessions and in conjunction with the rest of the Summit program. The scheduling function also includes, but is not limited to: 1) sending each matchmaking registrant a digital package before the matchmaking session that includes the registrant's schedule of meetings, background and contact information on all the matches with whom they are meeting, and any additional pertinent information; 2) troubleshooting any scheduling issues that may arise; and 3) providing support to the IDI staff as needed in preparation of the matchmaking session. The deadline for work to be completed for this phase is Tuesday, November 14, 2017, so that matchmaking participants will have two weeks in advance notice of their scheduled meetings.

### Phase V: On-site Support at Insurance Diversity Summit

Contractor must send designated staff member(s) to provide on-site assistance and support at the Insurance Diversity Summit before, during, and after the matchmaking session. Contractor staff is expected to arrive when IDI staff arrives at the Summit venue. Travel expenses incurred for travel to California State University – Sacramento and for staffing the matchmaking process should be included in the cost proposal provided under this section. Contractor staff is

expected to perform the following duties, including (but not limited to): 1) arriving on time to assist IDI staff in matchmaking setup (tables, chairs, formations, etc.); 2) maintaining a seat at the main registration table to check-in matchmaking participants and answer any questions about the process; 3) running the entire schedule for the matchmaking session with minor assistance from IDI staff; 4) making sure all meetings are arranged and the time schedule is kept; 5) assisting any matchmaking registrants whose meetings have been cancelled, moved, or delayed; 6) be ready to switch around schedules in the event of multiple meeting changes; 7) create name cards, insert into name badge holders, and alphabetize name cards for all Summit Attendees with visible identifiers unique to CDI Staff, Insurance Diversity Task Force, Insurer, Diverse Supplier, and Stakeholder; and 8) setup on-site matches if non-registered participants would like to schedule meetings. This work will all occur on the day of the Insurance Diversity Summit on Tuesday, November 28, 2017.

#### Phase VI: Post-Event Debriefing

Contractor will provide to IDI staff a final list of registered participants including name, title, organization, e-mail, work address, work number, cell number, and website (if available). Contractor will also provide to IDI staff a final schedule of which matchmaking sessions took place and which were cancelled including the reasoning. A follow-up physical and an online electronic survey will be created and administered to all general registrants about their experiences at the Summit and with matchmaking. Contractor will be responsible for collecting responses and will make an effort to retrieve feedback from matchmaking participants especially. An analysis of this survey will be provided to IDI staff which will provide recommendations on how to improve the Summit and matchmaking next year. The deadline for work to be completed for this phase is Friday, December 22, 2017.

#### Insurance Diversity Summit Schedule

Contractor's consultation with IDI staff will begin Monday, July 17, 2017. Contractor will seek to support IDI staff in preparing for and executing the matchmaking sessions from this date till the end of Phase VI: Post-Event Debriefing on Friday, December 22, 2017. All work performed must be invoiced by Thursday, February 1, 2018.

### B. ACCEPTANCE CRITERIA

It shall be the State's sole determination as to whether a deliverable has been successfully completed and acceptable to the State. There must be a signed acceptance document for each deliverable before invoices can be processed for payment.

### C. TRAVEL

The Contractor will bear all travel, shipping and delivery costs.

**ATTACHMENT B**  
**MINIMUM REQUIREMENTS**

1. Contractor must possess the following minimum qualifications:
  - a. Must be certified with the California Department of General Services as a Small Business, Microbusiness, Nonprofit Veteran Service Agency (NVSA), and/or Disabled Veteran Business Enterprise.
  - b. Must have provided matchmaking services for an event on at least one other occasion.
  - c. Must have the support staff and equipment needed to perform matchmaking services, including creating and managing an online registration portal.



**ATTACHMENT C  
 COST WORKSHEET**

All costs associated with providing the services described in ATTACHMENT A, SCOPE OF WORK must be included herein.

In case of ties, the winning Offeror will be determined by a coin toss.

**Insurance Diversity Summit:**

Contractor requests the following budget as outlined in the table below (subject to change):

<b>Phase</b>	<b># of Hours</b>	<b>Cost</b>
<b>Phase I:</b> Consultation and Discussion of IDI's Matchmaking Needs		
<b>Phase II:</b> Development, Setup and Hosting of Online Registration Portal		
<b>Phase III:</b> Registration Support to Matchmaking Participants and CDI Staff		
<b>Phase IV:</b> Coordinating and Scheduling Matchmaking Meetings		
<b>Phase V:</b> On-site Support at Insurance Diversity Summit		
<b>Phase VI:</b> Post-Event Debriefing		
<b>Total Hours</b>		
<b>Blended Hourly Rate*</b>		
<b>Total Cost for Insurance Diversity Summit</b>		
*The blended hourly rate is derived from Contractor staff hourly bill rates as a proportion of their total time dedicated to this engagement.		

**ATTACHMENT D**  
**BIDDER DECLARATION &**  
**COMMERCIALLY USEFUL**  
**FUNCTION (CUF)**

**Bidder Declaration & Commercially Useful Function (CUF) Evaluation:** If you are a Micro Business, Small Business, or Disabled Veteran Business owner providing a bid, you must complete and return a Bidder Declaration as well as complete and sign the CUF evaluation below. Please answer “Yes” or “No” to the following questions by circling your response.

1. Are you (the supplier) responsible for the execution of a distinct element of the resulting State Contract?   **Yes**   **No**
  
2. Will you (the supplier) actually be performing, managing, or supervising an element of the resulting State Contract? **Yes**   **No**
  
3. Will you (the supplier) be performing work that is normal for your business, services, and function? **Yes**   **No**
  
4. Will you be doing any further subcontracting that is greater than that expected to be subcontracted by normal industry practices?       **Yes**   **No**

CERTIFICATION: BY SIGNING THE BID RESPONSE, I CERTIFY UNDER PENALTY OF PERJURY THAT THE INFORMATION PROVIDED IS TRUE AND CORRECT.

Vendor Signature: \_\_\_\_\_

Date: \_\_\_\_\_