



**COVERED  
CALIFORNIA**

**Request for Proposal  
RFP 2014-20: Advertising & Marketing Campaign**

**California Health Benefit Exchange  
Covered California™**

**March 5, 2015  
Addendum #2  
March 17, 2015**

California Health Benefit Exchange  
Covered California  
1601 Exposition Boulevard  
Sacramento, CA 95815  
[www.CoveredCA.com](http://www.CoveredCA.com)

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## I. GENERAL INFORMATION

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### A. Background

Soon after the passage of national health care reform through the Patient Protection and Affordable Care Act of 2010, California became the first state to enact legislation to establish a qualified health benefit exchange. The California state law is referred to as the California Patient Protection and Affordable Care Act.

The goals and objectives of the California Health Benefit Exchange (also known as, and hereafter referred to as its branded name, Covered California) are to:

- Reduce the number of uninsured Californians by creating an organized, transparent marketplace for Californians to purchase affordable, quality health care coverage;
- Strengthen the health care delivery system;
- Serve as an active purchaser, including creating competitive processes to select participating carriers and other contractors;
- Require that health care service plans and health insurers provide coverage in the individual and small group markets and compete on the basis of price, quality, and service; and
- Meet federal and state law requirements, guidance and regulations.

Covered California is an independent public entity within California State Government. It is governed by a five member board appointed by the Governor and Legislature.

Covered California works in close partnership with:

- Department of Health Care Services, which oversees and administers California's Medicaid Program (Medi-Cal) and other specifically focused health programs;
- The two agencies that regulate health insurance in California: Department of Managed Care and Department of Insurance; and
- A broad range of stakeholders whose constituencies are impacted by health care reform.

For additional information on Covered California, please refer to the consumer website at: [www.CoveredCA.com](http://www.CoveredCA.com).

### B. Purpose

The purpose of this Request for Proposal (RFP) 2014-20 is for Covered California to solicit proposals from qualified advertising agencies to provide multi-segment, integrated communications services through a statewide media campaign with the goal of educating consumers about Covered California's services and maximizing the number of Californians enrolled in health insurance coverage.

The selected Contractor is expected to create a statewide media campaign based on the attached Scope of Work (SOW), which builds upon the strengths and strategies of the current Covered California media campaign while introducing fresh, innovative ideas that will continue to move the campaign forward. Covered California's agency partner must be able to combine rigorous and insightful account planning and strategic development with effective

creative solutions that successfully engage with consumers and modify behavior.

To view materials and resources related to this procurement, please visit Covered California's Health Benefit Exchange (HBEX) Solicitations website at: <http://hbex.coveredca.com/solicitations/> (hereafter referred to as the "HBEX website").

### **C. Goals**

Covered California seeks a dynamic advertising agency with strong, full-service capabilities that can produce a best in class advertising and marketing campaign anchored in diversity with an ability to reach the general market and multicultural populations. The advertising agency must be highly strategic in order to lead Covered California's integrated media account and help navigate future challenges and opportunities. The advertising campaign must be multi-platform and integrated to maximize effectiveness, and be responsive to changes in the media marketplace and consumer behavior. The agency must demonstrate its ability to reach and influence new customers as well as develop communication strategies to retain and renew our current members. The agency must commit a team of experienced professionals to the account who have experience outreaching to the multicultural and multi-language California population, are fully immersed in the business from top to bottom, highly detail-oriented, and who are constantly striving to improve what they do.

The agency must have strong project management skills, the ability to manage a team of subcontractors, extensive knowledge of the diverse California media market; and the ability to manage advertising development, testing, production, evaluation and media placement to address Covered California's priorities.

The selection process for this RFP (also referred to as "solicitation") will focus on the Bidders' organizational strategic planning capabilities, creative breadth, cost efficiency, project management capabilities and flexibility under tight deadlines (especially during Open Enrollment periods), and the ability to target Covered California's multicultural target populations, including non-English speaking communities, through a strategic media plan and with culturally relevant creative.

### **D. Objectives**

The selected Contractor will target California's culturally diverse multi-segment market (English-speaking Californians – including African Americans, Hispanic/Latinos and Asian/Pacific Islanders), as well as Spanish, Mandarin, Cantonese, Korean, Vietnamese, Tagalog and other language-specific and/or culturally relevant target markets specified by Covered California.

Services shall be provided statewide, with strategic and cost-efficient media activities that maximize outreach to all Covered California target markets. See "Subcontractors" on page 6 for additional information if the selected Contractor does not demonstrate, to the satisfaction of Covered California, their internal capabilities to address one or more specific target markets.

## E. Who May Submit a Proposal

The minimum required qualifications for Bidders include:

- A currently operating, full-service advertising agency in operation since 2010 with minimum annual gross billings of **\$100 million** – which may include media placement billings for Bidder’s clients completed by an external media buying service – in at least two of the past three years;
- A California-based, full-service office that will service the Covered California account with a minimum of 50 employees; and,
- No conflicts of interest.

These preliminary eligibility requirements must be certified by the Bidder in Stage 1 as further described in Section II, Proposal Submission and Stages.

Each Bidder may submit only one proposal for this RFP. More than one Bidder with the same ultimate holding company will be allowed to compete as long as there is neither collaboration on the proposals nor any shared day-to-day management, staff, or supervisory relationship between the proposing advertising agencies.

Subcontractors may participate in more than one bidding proposal.

Any costs incurred by those participating at any stage of the RFP process are the sole responsibility of the Bidder and will not be reimbursed by Covered California.

## F. Contract Term

The initial term of the contract shall be for three years, June 1, 2015 through May 31, 2018. Covered California has the option, at its sole discretion, to extend the term of the contract under the same terms and conditions, including pricing terms, for two one-year extensions.

The contract term may change if Covered California makes an award earlier than expected or if Covered California cannot execute the agreement due to unforeseen delays.

The resulting contract will be of no force or effect until signed by both parties. The Contractor shall not commence performance until a valid contract has been executed between the successful Bidder and Covered California. Covered California will not pay for any services performed prior to the execution of a valid contract.

## G. Anticipated Funding

It is estimated that the initial funding for the contract will be approximately **\$50 million** per year for the five-year term of the contract including extensions.

Funding is subject to annual budget approval by the Covered California Board of Directors. Depending on shifts in Covered California goals or objectives, funding available in the resulting contract may increase by \$10 to \$15 million per year. However, Bidders should not base its proposal on the potential for increased funding in any given year.

If full funding does not become available, Covered California will terminate or amend the agreement to reflect reduced funding and reduced deliverables.

#### **H. Scope of Work**

See Exhibit A, entitled “Scope of Work,” for a detailed description of the services and work to be performed as a result of this procurement.

#### **I. Subcontractors**

Given the rich diversity of California, it is anticipated the successful Bidder will most likely need to subcontract with one or more agencies with demonstrated knowledge, experience, and marketing capacity to effectively reach targeted ethnic communities. Covered California also realizes that many advertising agencies rely on a media-buying service in order to offer cost-competitive pricing for its clients.

If the Bidder does not have the full service capabilities to effectively accomplish all components of the SOW, they are **required to identify** proposed subcontractors. Each proposed subcontractor must complete and sign the “Proposed Subcontractor Advertising Agency Fact Sheet” (Attachment 7) to be included in the Bidder’s Stage 1 submission.

Covered California reserves the right to deny any or all proposed subcontractors of the selected Contractor. Posting the “Notice of Intent to Award” does not imply Covered California’s approval of proposed subcontractors.

If a proposed subcontractor is denied, or if the selected Contractor does not, to the satisfaction of Covered California, demonstrate their internal capabilities to address a specific target market and meet Covered California’s needs, the selected Contractor may be required to procure a subcontractor or consultant through a separate competitive process.

#### **J. Embedded Onsite Staff**

Covered California reserves the right to request embedded onsite Account and Digital & Social staff. Serving as project liaisons with the selected Contractor’s office(s), embedded staff duties may include consulting with Covered California on advertising and marketing strategies and activities, providing comprehensive account management and project services, managing digital or social content development, and providing customer service via social channels. Job classifications that may require embedded onsite staff are limited to Account Supervisor or lower.

#### **K. Reassignment of Personnel**

1. The selected Contractor shall not reassign personnel assigned to the contract during the term of the contract without prior written approval of Covered California. If a Contractor employee is unable to perform duties due to illness, resignation, or other factors beyond the Contractor’s control, the Contractor shall make every reasonable effort to provide suitable substitute personnel.
2. Substitute personnel shall not automatically receive the hourly rate of the individual or position being replaced. Covered California and the selected Contractor shall negotiate the hourly rate of any substitute personnel to the contract. The hourly rate negotiated

shall be dependent, in part, upon the experience and individual skills of the proposed substitute personnel. The negotiated rate cannot exceed the hourly rate stated in the contract.

3. Covered California reserves the right to request a Contractor employee be removed from performing any work on the contract and upon written notice to the Contractor, the Contractor shall assign a substitute employee.

**L. Nonexclusive Rights**

Covered California does **not** grant the selected Contractor the exclusive rights to provide all advertising, marketing and media services during the contract period. Covered California reserves the right to acquire advertising, marketing and media from other agencies without infringing upon, or terminating, the awarded contract.

The selected Contractor must collaborate with existing and future Covered California contractors, including research, public relations and advertising agencies, subcontractors, and consultants.

**M. News Releases and Social Media**

Bidders and the selected Contractor may not issue any news release nor make any statement to the news media or through social media channels pertaining to this RFP, any proposal, the contract, or work resulting therefrom, without first obtaining prior approval by Covered California.

**N. Key Action Dates**

Bidders are advised of the key dates and times shown below and are expected to adhere to them. All times noted in this document are Pacific Time (PT).

<b>Request for Proposal Release Date</b>	<b>March 5, 2015</b>
<b>Registration and Questions for Bidders' Conference Due</b>	<b>March 11, 2015 (3:00 p.m.)</b>
<b>Voluntary Bidders' Conference</b>	<b>March 13, 2015 (10:30 a.m. – 12:30 p.m.)</b>
<b>Stage 1 - Eligibility &amp; Capabilities</b>	<b>March 24, 2015 (3:00 p.m.)</b>
<b>Stage 2 - Webinar</b>	<b>April 2, 2015 (3:00 p.m.)</b>
<b>Stage 2 - Site Visits</b>	<b>April 21 – 23, 2015</b>
<b>Stage 3 - Financial Package Due</b>	<b>May 5, 2015 (3:00 p.m.)</b>
<b>Stage 3 - Oral Presentations</b>	<b>May 7 – 8, 2015</b>
<b>Notice of Intent to Award</b>	<b>Week of May 11, 2015</b>
<b>Estimated Start Date of Contract</b>	<b>June 1, 2015</b>

Covered California reserves the right to amend dates at any time during the RFP process.



It is the Bidders' responsibility to check for notices and addenda for this RFP on the HBEX website (<http://hbex.coveredca.com/solicitations/>) throughout the RFP process.

#### **O. Bidders' Conference and Registration**

Covered California will conduct a **voluntary**, pre-proposal Bidders' Conference on March 13, 2015, from 10:30 a.m. to 12:30 p.m. at Covered California's headquarters, located at 1601 Exposition Blvd., Sacramento, CA 95815.

Prospective Bidders are not required, but are strongly encouraged to participate. The purpose of the meeting is for Covered California to give an overview of itself, discuss the RFP process, and provide prospective Bidders with an opportunity to ask questions about preparing and submitting proposals.

Prospective Bidders are **required**, however, to register to attend the meeting via email to the address listed in Section IV.B. by March 11, 2015, at 3:00 p.m. The agency, name(s) of those attending, and contact information should be clearly identified. Calling in to the conference is not an option.

Questions sent in advance will be answered at the Bidders' Conference and must be submitted via email to the address listed in Section IV.B. by March 11, 2015, at 3:00 p.m.

Remarks and explanations expressed during the Bidders' Conference do not take precedence over the written provisions in the RFP documents and are not binding unless confirmed in writing by Covered California and posted on the HBEX website.

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## II. PROPOSAL SUBMISSION & STAGES

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### A. Overview

This section contains the RFP instructions for Stage 1 and general instructions for Stages 2 and 3. At the completion of each stage, Bidders will be notified in writing as to whether they qualify to continue to the next stage. Those Bidders competing in Stages 2 and 3 will receive additional instructions upon notification of successful advancement.

See Section III, Evaluation Process & Criteria, for details on the scoring benchmarks.

### B. Stage 1: Eligibility and Capabilities Requirements

#### Overall Stage 1 Instructions:

- Complete Items 1 through 6 as directed below.
- See Section IV, Submission Requirements, for formatting and submission address.

Scoring: After review and evaluation of the Stage 1 submittals, those Bidders receiving a minimum overall rating of “Exceeds” will advance to Stage 2. Bidders receiving a minimum of “Meets” may, advance to Stage 2, at the sole discretion of the Covered California Evaluation Team.

Items 1 through 5 will be used to determine eligibility and will be scored on a pass/fail basis. Scoring benchmarks for Item 6, “Agency Capabilities,” are provided in Section III, Evaluation Process & Criteria.

#### 1. Proposal Cover Page

##### Instructions:

- Complete and sign the “Proposal Cover Page” Form (Attachment 1).

#### 2. California Office and Gross Billings

##### Instructions:

- Complete and sign the “California Office and Gross Billings Certification” Form (Attachment 2).

#### 3. Guaranty

##### Instructions:

- Complete and sign the “Guaranty” Form (Attachment 3) from the Bidder, or Parent Corporation if the Bidder is a subsidiary.

#### 4. Conflict of Interest

Instructions:

- Complete and sign the “Conflict of Interest” Form (Attachment 4).

#### 5. Federal Debarment, Suspension, Ineligibility and Voluntary Exclusion – Certification

Instructions:

- Complete and sign the “Federal Debarment, etc.” Certification Form (Attachment 5).

#### 6. Agency Capabilities Overview

Instructions:

- Complete a narrative response to Items 6a and 6b below. See Section IV for format requirements.

##### a. Agency Strengths and Experience (four pages maximum)

Instructions:

Address the following items representing your California-based office(s) that would service the Covered California account:

- 1) Strengths. Describe your agency’s strengths during the past three years, including accomplishments, unique services, account leadership, and experience working on accounts of similar size or scope.
- 2) Agency Experience. Describe your agency’s capabilities and experience performing the following services, including, but not limited to: account management; market research; strategic planning; social media planning, execution, and optimization; media planning, buying, and evaluation; creative development; production expertise; production and media quality assurance; and, expertise tracking key trends and issues in advertising and marketing.
- 3) Multicultural and Ethnic Experience. Describe the experience and expertise of your agency, or that of your proposed subcontractors, at successfully reaching multicultural or ethnically diverse communities in California, including the utilization of in-language media. Include research, planning, execution, and evaluation processes as they relate to client needs and objectives.

##### b. Advertising, Creative and Placement Effectiveness (five pages maximum)

Instructions:

- Provide a narrative to the following items:

- 1) Strategic Services. Describe your agency's experience in creating an annual strategic marketing plan, including the steps you take to create the plan and the client's collaborative involvement in the process.
- 2) Research and Evaluation. Describe your agency's research, development, strategic planning, and evaluation processes. Include in your description whether these functions are normally performed in-house or by a subcontractor or consultant. Describe what your agency considers successful/unsuccessful Return on Investment (ROI) and provide an example of how it has been established for a client. Discuss how evaluation is approached, including what variables (monetary or otherwise) are tracked. For non-sales based accounts, discuss how your client's ROI of brand awareness, image, and/or changing of cultural norms were evaluated.
- 3) Media Management. Describe your agency's capabilities and strengths in media research, planning, buying, monitoring and overall stewardship of your clients' funds. Please make sure you address traditional as well as digital media, as applicable. If all, or a certain portion, of your clients' media is not planned or purchased by your agency, please indicate with whom the agency works in this regard. If TV is to be purchased by another entity, provide their total California media placement during calendar year 2014, with a breakout of spot TV (provide daypart splits and TV media markets) and other TV purchases.
- 4) Social Media Utilization. Describe your agency's approach to maximizing social media efforts that contribute to a cohesive brand approach. Include details of your involvement providing customer service on behalf of your clients via social channels, if applicable. Discuss your experience in content development for client social channels, if applicable.

#### c. Fact Sheets

##### Instructions:

- Complete the "Bidding Agency Fact Sheet" Form (Attachment 6).
- Have each proposed subcontractor complete and sign the "Proposed Subcontractor Advertising Agency Fact Sheet" Form (Attachment 7).

#### C. Stage 2: Site Visit and Account Staffing Proposal

Overall Stage 2 Instructions: Each Bidder that advances to Stage 2 will be contacted to schedule a time when the Covered California Evaluation Team can visit the agency. The time limit for each site visit is **three hours**, including introductions and an agency tour. At least **20 minutes** must be allotted at the end for the Covered California Evaluation Team to ask questions. Please also allocate **10 minutes** for a break at the mid-point of the meeting. Time limits will be strictly adhered to, and it is the responsibility of the Bidder to monitor its time accordingly.

At least one representative (but no more than two) from each proposed subcontractor that

would staff the Covered California account **must** attend.

**Scoring:** After review and evaluation of the Stage 2 Site Visits, those Bidders receiving a minimum overall rating of “Exceeds” will advance to Stage 3. Agencies receiving a minimum of “Meets” may be advanced to Stage 3, at the sole discretion of the Covered California Evaluation Team.

**Stage 2 Webinar:** A webinar for Bidders participating in Stage 2 will be held on **April 2, 2015, at 3:00 p.m.** The purpose of the webinar is to discuss objectives for the Site Visits, clarify the Advertising Assignment, and answer questions from Bidders. No evaluations will be made at this webinar and no affirmations will be provided to the Bidders. The login information will be sent to the Stage 2 Bidders prior to the webinar, and webinar materials will be emailed after the webinar.

## **1. On-Site Agency Presentations**

### Instructions:

- Provide presentation materials to the Covered California Evaluation Team during the Site Visit, see Section IV for format requirements.

### **a. Agency Overview and Creative Reel Presentation**

#### Instructions:

- Provide a brief presentation that highlights the capacity and sense of style of the agency’s California-based office(s) that would be assigned to the Covered California account. Proposed team members should provide an understanding of the agency’s strategic and creative capabilities and tailored media placement experience. In addition, the agency’s philosophy, specific strengths and collaboration style with the client and other agencies (public relations and/or subcontractors) should be discussed.
- Show a reel which illustrates the agency’s unique creative strengths and highlights ads with messages including emotional appeal, memorable simple messages, or a clear call to action. The reel must not exceed five minutes and must include at least three TV ads and two digital ads or social media efforts, primarily showcasing the work of the agency’s California office(s) and produced after January 1, 2012.

### **b. Case History Presentation**

#### Instructions:

- Select one recent advertising campaign with a multicultural focus that a California-based office designed and implemented. Present the details from beginning to end.

The presentation must, at a minimum, include:

- 1) Timeline.
- 2) Key facts from background market research and analysis.
- 3) Identification of target markets, including approximate audience size, age range, socioeconomic status, language, and culture/ethnicity.
- 4) Collaboration of partners when outreaching to ethnic populations if not completed by Bidder.
- 5) Creative strategy/positioning.
- 6) Three to five examples of creative developed for the campaign. Include the production costs for each example (examples of TV creative should be limited to a production budget of \$500,000 or less). Highlight examples of creative that crossed over to other mediums. At least one example must be a digital asset.
- 7) Media objectives for the selected campaign; discussion must include media deliverables, weight, estimated gross costs, and any added value opportunities negotiated.
- 8) How the campaign was evaluated, the results obtained, and how results impacted your client's business objectives.
- 9) Challenges or other considerations (e.g., budget, competition, organizational, and environmental constraints).
- 10) Current agency staff who worked on the campaign and their roles.

### c. Advertising Assignment Presentation

#### Instructions:

- An assignment to address specific challenges Covered California faces will be sent separately to all Bidders that advance to Stage 2. Bidders may be asked to present potential creative direction, but speculative creative will not be required at this stage. Each proposed subcontractor must participate.

### 2. Account Staff Proposal (four pages maximum per Bidder/proposed subcontractor)

#### Instructions:

- For the **Bidder and any proposed subcontractors**, include a response to the following items, to be included with the presentation materials requested above, but not to be presented at the Site Visit:

#### a) Organizational and Staff Structure

Provide a one-page (no larger than 11 by 17 inches) visual layout of the agency's organizational and staff structure for the office(s) that would service the account.

Include the total number of current full-time account employees in the California office(s).

Please include photographs of each proposed account staffing team member with names and titles, as well as any others who present during the Site Visit.

b) Primary Account Staffing Summary

Complete the "Proposed Account Staffing Chart" (Attachment 8), not to exceed two pages, identifying the proposed day-to-day lead, and **primary** account, creative, and media staff who will be assigned to the Covered California account. Include the following information on the proposed account staff:

- 1) Brief description of duties as related to the Covered California account.
- 2) Proposed percentage of time to be dedicated to the Covered California account.
- 3) Specific training or expertise that is relevant and would be helpful to the Covered California account.
- 4) Identify any vacancies or positions which would be filled or created upon award of the Covered California account. Indicate their percentage of time to be dedicated to the Covered California account and the duties they would perform.

**3. Client References** (three pages maximum)

Instructions:

- Complete the "Client References" Form (Attachment 9) to be included with the presentation materials requested above, but not to be presented at the Site Visit.

**D. Stage 3: Oral Presentations and Financial Package**

Overall Stage 3 Instructions: Up to three Bidders will move on to Stage 3 and will be contacted to schedule a time for the oral presentation at Covered California headquarters in Sacramento on **May 7-8, 2015**. A general overview of the format and expectations of the Financial Package are provided below.

Scoring: The Cost Proposal Assignment and Oral Presentation will be reviewed and evaluated by the Covered California Evaluation Team using the Rating Chart shown in Section III, Evaluation Process & Criteria. The Financial Records and Bankruptcy and Litigation Disclosure will be scored on a pass/fail basis. Incentives for certified Disabled Veteran Business Enterprises/Small Businesses will be applied in the event of a tie at the completion of Oral Presentations. See Section IV.G. for additional information.

## 1. Financial Package

### Instructions:

- Each Bidder must submit two copies of the financial documents in separate, sealed envelopes marked “Financial Records,” the Bidder’s name, and “RFP 2014-20: Advertising & Marketing Campaign” via courier or overnight service by **May 5, 2015, at 3:00 p.m.**

See Section IV for submission requirements.

Covered California reserves the right to require any additional information necessary to determine the financial integrity and stability of a Bidder.

### a. Cost Proposal Assignment

#### Instructions:

- Complete the “Advertising Cost Proposal” Form (Attachment 10).

### b. Financial Records

#### Instructions:

- Audited statements for the most recent calendar or fiscal year are preferred, but not required. If audited financial statements are supplied, all noted audit exceptions must be explained. If audited financial statements are not available, Covered California will accept accrual basis financial statements prepared by a Bidder’s financial accounting department or an accounting firm along with copies of the federal tax return filed with the Internal Revenue Service for the most recent year. A statement signed in blue ink by a Bidder’s Chief Financial Officer certifying that the financial statements are accurate and complete must accompany all financial statements.

*Financial records of all Bidders received by Covered California are considered confidential and will be destroyed at the time of Contract Award.*

### c. Bankruptcy and Litigation Disclosure

#### Instructions:

- Complete the “Bankruptcy and Litigation Disclosure” form (Attachment 11).

### d. Disabled Veteran Business Enterprise (DVBE) Preference

#### Instructions:

- Complete and sign the “Disabled Veteran Business Enterprise Participation Incentive” form (Attachment 12), and “DVBE Declarations” form (Attachment



13) *only if* the Bidder or a proposed subcontractor has a Disabled Veteran Business Enterprise certification.

**e. Small Business (SB) Preference**

Instructions:

- Complete and sign the “Small Business (SB) Participation” form (Attachment 14), *only if* the Bidder or a proposed subcontractor has a Small Business certification.

**f. Certificate of Liability Insurance**

Instructions:

- Provide a Certificate of Liability Insurance demonstrating coverage equal to or greater than \$1,000,000. (form not provided)

**g. Automobile Liability Insurance**

Instructions:

- Provide proof of Automobile liability, including non-owned auto liability, of \$1,000,000 per occurrence for persons used by Contractor for services provided pursuant to this Agreement. (form not provided)

**h. Errors and Omissions Insurance**

Instructions:

- Provide proof of Errors and Omissions Insurance presently in effect of no less than \$1,000,000 per occurrence. (form not provided)

**i. Workers’ Compensation Liability Insurance**

Instructions:

- Provide proof of Workers’ Compensation Liability Insurance. (form not provided)

**2. Oral Presentation**

Instructions:

- Provide presentation materials to the Covered California Evaluation Team during the Oral Presentation. See Section IV for format requirements.

**a. Advertising Assignment Presentation**

An assignment which expands upon the Stage 2 Site Visit Agency Assignment will

be sent separately to all Bidders that advance to Stage 3. **Bidders may be asked to present limited speculative creative.**

b. **Time Limit**

The time limit for each presentation is **2.5 hours**, including introductions. At least **20 minutes** must be allotted at the end for the Covered California Evaluation Team to ask questions. Time limits will be strictly adhered to, and it is the responsibility of the Bidder to monitor its time accordingly.

c. **Agency Attendance**

Day-to-day account management, creative personnel, and media staff that would service the Covered California account must play a major role in the presentation. Limit those who attend to no more than ten total (including proposed subcontractors).

At least one representative from each proposed subcontractor that would staff the Covered California account must attend.

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### III. EVALUATION PROCESS & CRITERIA

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Covered California will conduct a fair and impartial evaluation of proposals received in response to this RFP. Proposals submitted in response to this RFP may be evaluated in comparison with other submitted proposals. **Clarification may be requested via email from participating Bidders during any phase of the evaluation process.**

#### A. Best Value Analysis

For the purposes of this RFP, the best value proposal will be the proposal that provides the best overall value to Covered California and that is most likely to result in a contract that fulfills Covered California's mandates to: 1) award a contract to the responsible agency submitting the best value proposal that maximizes the benefits to Covered California in relation to the areas of competence, experience, cost effectiveness, and timely performance; 2) act to promote and ensure integrity, honesty, and fairness in the operation and administration of Covered California; and 3) maximize acquisition, retention, and renewal of Covered California membership.

As part of the best value proposal evaluation process, Covered California may award a contract based on the proposals submitted or establish a competitive range and hold discussions with each Bidder in the competitive range. The competitive range will be composed of the most highly-rated proposals consistent with the need for an efficient competition. If conducted, negotiations will be undertaken with the intent of allowing each Bidder the opportunity to provide the best value in specific areas identified by Covered California.

Covered California may indicate to, or discuss with, each Bidder in the competitive range any weaknesses, deficiencies, and other aspects of its proposal such as price, technical approach, and terms that could, in the opinion of Covered California, be altered or explained to enhance the proposal's potential for award. The scope and extent of discussions are a matter solely within Covered California's judgment.

## B. Rating Chart

All materials and requirements not identified as pass/fail will be evaluated using the rating chart shown below:

<b>Rating</b>	<b>Definition</b>
<b>Superior</b>	Proposal exceptionally exceeds performance or capability requirements; proposal demonstrates extraordinary strengths that will more than significantly benefit Covered California.
<b>Significantly Exceeds</b>	Proposal significantly exceeds performance or capability requirements; proposal demonstrates exceptional strengths that will significantly benefit Covered California.
<b>Exceeds</b>	Proposal exceeds performance or capability requirements; proposal has one or more strengths that will benefit Covered California.
<b>Meets</b>	Meets specified minimum performance or capability requirements necessary for acceptable contract performance.
<b>Meets with Exceptions</b>	Proposal demonstrates weak performance or capability standards necessary for minimum contract performance; proposal has one or more weaknesses that offset any strengths.
<b>Does Not Meet</b>	Fails to meet specified minimum performance or capability requirements. Proposals with an unacceptable rating are not awardable.

### C. Evaluation Criteria

The Bidder's California-based office(s) assigned team demonstrates the following to effectively service Covered California:

<b>Stage 1: Eligibility &amp; Capabilities Requirements</b>
<ul style="list-style-type: none"><li>➤ Full service capabilities and experience to deliver a broad range of advertising services to meet the requirements of the SOW;</li><li>➤ Strong capacity to service Covered California through its accomplishments, unique services and account leadership;</li><li>➤ Strong research, planning, and execution processes to successfully reach ethnic, economic, and/or culturally diverse populations;</li><li>➤ Clearly identifies how services that cannot be conducted in-house would be performed and the capacity of proposed subcontractors to achieve those services;</li><li>➤ Experience and capacity to conduct research and strategic planning by its personnel, subcontractor, or outside vendor;</li><li>➤ Knowledge in evaluating the efficacy of strategies of advertising and marketing campaigns at various stages of development and placement;</li><li>➤ Quality of media capabilities (research, planning, monitoring, and analysis);</li><li>➤ Capability and experience in purchasing media in different outlets, either in-house or through a media buying service (Note: Bidders will not be advantaged or disadvantaged for the use of a media buying service);</li><li>➤ Robust experience, knowledge, and capacity to provide social media services, including content creation and customer service;</li><li>➤ Strong capabilities to evaluate and track ROI;</li><li>➤ Agency size and full-time staffing to client ratio is adequate to meet needs of SOW;</li><li>➤ Quality and relevance of client list, and a reasonable turnover of accounts.</li></ul>

The Bidder's California-based office(s) assigned team demonstrates the following to effectively service Covered California:

### Stage 2: Site Visit & Account Staffing Proposal

- Capacity of Bidder's office(s) and team who would be assigned to the account, which is compatible with Covered California;
- Displays its philosophy, strengths, and collaboration style with clients and other agencies, which is compatible with Covered California;
- Proposed subcontractors display experience, skill and expertise to reach designated target populations;
- Case history demonstrates:
  - Strategic ability and is based on market research and analysis;
  - Identification of objectives and target market(s);
  - Reach of intended target audience through successful media placement;
  - Added value opportunities;
  - Campaign evaluation and analysis for potential impact of future efforts in a manner acceptable to Covered California;
  - Appropriate handling of challenges or other considerations that impacted the campaign;
  - Roles of the current staff who worked on the campaign.
- Advertising Assignment demonstrates Bidder and proposed subcontractor(s) offer:
  - High caliber of strategic thinking;
  - Capacity to utilize current research findings in developing strategies to effectively implement an advertising campaign plan for Covered California;
  - Strategic ability to build on the strengths of the current Covered California Advertising & Marketing Campaign;
  - A culturally appropriate strategy and creative capable to maximize reach of California's diverse target markets;
  - Innovative integrated communications planning that drives member renewals and enrollments;
  - Advancement of Covered California's overall mission and goals.
- Proposed Account Staffing of Bidder and proposed subcontractor(s) demonstrate:
  - Cost-competitive staffing structure and sufficient time dedication;
  - Assignment of highly capable staff with expertise, training, skills and experience identified in SOW;
  - Day-to-day lead has the capacity and capability to effectively and efficiently accomplish tasks identified in SOW.

The Bidder's California-based office(s) assigned team demonstrates the following to effectively service Covered California:

### Stage 3: Financial Package & Oral Presentation

- Bidder has the most effective and experienced combination of account, media, and creative staff, and multi-ethnic expertise to help Covered California achieve its marketing goals.
- Cost Proposal Assignment demonstrates:
  - Cost-effective, high-caliber staffing structure covering strategic marketing plan development, creative development and production, collateral development, digital and social media, media planning and buying, and research and analytics services;
  - Ability to quickly deploy an experienced, talented team of account management, creative development, and media planning and buying professionals who can effectively deliver in Covered California's fast-paced environment;
  - Delivery of a cost-efficient arrangement for outsourcing to subcontractors;
  - Ability to maximize media cost-effectiveness by negotiating significant media discounts and impactful added-value when planning and buying media across multi-ethnic media channels;
  - Capability to deliver industry data and industry research insights as added-value to Covered California periodically.
- Oral Presentation demonstrates:
  - Strengths in all aspects of research, planning, execution and evaluation necessary to sustain a long-term advertising campaign with continued innovation;
  - Understanding of Covered California's business objectives and demonstrate an ability to develop a holistic strategic advertising and marketing plan that supports these objectives;
  - Understanding of Covered California's target audience and demonstrates an ability to convey multicultural appropriateness in proposed efforts;
  - Ability to develop and balance an integrated, multi-touch point and ethnic/language specific marketing campaigns that best meets Covered California's marketing objectives;
  - Approach and ability to establish ROI and evaluate campaign effectiveness;
  - Collaboration style, philosophy and process with clients;
  - Flexibility in adjusting marketing campaign elements based on Covered California's feedback and changing needs;
  - Each proposed subcontractor has collaborative skills and expertise in reaching Covered California's goals and provides overall added value to the Bidding team.

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## IV. SUBMISSION REQUIREMENTS

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### A. Format Requirements

#### 1. Copies Required

For each stage, provide one hard copy marked "MASTER," seven hard copies, and one digital copy on a USB-compatible computer memory stick of all requested materials. For any audio or visual examples shown at the Site Visit or Oral Presentation, provide one digital copy on a USB-compatible computer memory stick.

Each copy of the proposal must be complete, including all of the required attachments and documentation submitted in the "MASTER."

#### 2. Narrative Format

- a. Narrative portions of proposal responses should be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of this RFP. Emphasis should be on conformance to the RFP instructions, responsiveness to the RFP requirements, completeness and clarity of content. Expensive bindings, colored displays, promotional materials, etc., are not necessary or desired. However, it is requested that responses are bound.
- b. Bidders must follow the format requirements listed below for all narrative portions of the RFP. Failure to do so may result in an entire proposal or affected section not being read or evaluated.
  - 1) Use a Times New Roman, Arial, or Calibri font of at least 12-point size throughout. Exception: if a form is required by the State that contains a smaller font.
  - 2) Print pages single-sided on letter size (8.5 by 11 inches) white paper with **1.5 line spacing**, unless otherwise noted.
  - 3) Use one-inch margins at the top, bottom, and both sides.
  - 4) Sequentially number the pages in each section and clearly identify each section in the order requested. When a page limit is noted, pages exceeding the limit will not be scored. It is not necessary to paginate the required forms.
  - 5) Place the Bidder's name in a header or footer on every page. If the Bidder's name is not already entered elsewhere on a completed certification or form, add it to a header, footer, or signature block.
  - 6) Have a person who is authorized to bind the proposing firm sign each RFP attachment that requires a signature in **blue** ink. Signature stamps are not acceptable.
  - 7) Place the original signed attachments in the proposal set marked "MASTER." The additional copies may have photocopied signatures on attachments and



throughout the document.

**B. Submission of RFP Materials**

“RFP materials” means anything submitted by a Bidder to Covered California in response to this RFP, including, but not limited to, written questions about this RFP, and responses to any stage. The sealed package must be plainly marked with the (1) RFP number and title, (2) Bidder name and address, and (3) “DO NOT OPEN”, addressed to the following:

<b>U.S. Mail, Courier, or Overnight Service</b> (for RFP Stage 1 and Stage 3 Financial Package submissions)	<b>Email</b> (for correspondence only)
RFP 2014-20: Advertising & Marketing Campaign California Health Benefit Exchange Covered California Attention: Mr. John Chermesino 1601 Exposition Blvd Sacramento, CA 95815 DO NOT OPEN	Email: <a href="mailto:hbexsolicitation@covered.ca.gov">hbexsolicitation@covered.ca.gov</a>  Subject line <b>must</b> include: RFP 2014-20

Bids not submitted under sealed cover may be rejected.

**C. Importance of Meeting Deadlines**

Bidders are responsible for the delivery of submissions to Covered California prior to the submission deadline. If the package tracking information indicates its arrival at Covered California by the deadline, the package will be considered to have arrived on time. Postal service postmarks, however, will not be accepted as proof of timely delivery. Faxed or electronic submissions will not be accepted. All stages of this RFP have stated deadlines for submitting materials to Covered California which will be strictly enforced. Submissions that are incomplete or received after the stated deadline will not be accepted or reviewed.

**D. Communication Between Covered California and Bidders**

**1. Bidder Questions**

Should any Bidder need to communicate with Covered California regarding the RFP or the proposal review process, the Bidder should do so in writing and send it to the email address provided in Section IV.B. *No phone calls will be accepted.*

Immediately notify Covered California if you need clarification about the services sought or have questions about this RFP’s instructions or requirements. At its discretion, Covered California reserves the right to contact an inquirer to seek clarification of any inquiry received.

**2. Errors**

If a Bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP, the Bidder shall immediately notify Covered California of such error in writing and request modification or clarification of the document. Modifications or clarifications will be

given by written notice and posted on the HBEX website, without divulging the source of the request for modification or clarification. Covered California shall not be responsible for failure to correct errors.

### 3. Deviations and Modifications

All submissions should be complete when received at Covered California. No changes, modifications, corrections, or additions may be made once they are submitted to Covered California. A Bidder will be allowed to withdraw its proposal provided that the written request for such withdrawal is received prior to the deadline for final submission. After withdrawing a proposal, Bidders may resubmit a new proposal according to the proposal submission instructions. Replacement proposals must be received at the stated place of delivery by the proposal due date and time.

Covered California may, at its sole discretion, waive any immaterial deviation or defect in a submission. However, the waiver of an immaterial deviation or defect in a submission will in no way modify the document or excuse the Bidder from full compliance with the RFP requirements if awarded the contract. Items may be considered "immaterial" by Covered California if, for example, they do not affect the amount of the Cost Proposal, or if allowing the deviation does not give a Bidder an advantage or benefit that would not be granted to all other Bidders.

1. If the Bidder's intent, as determined by Covered California, is clearly established based on review of the complete Final Proposal submittal, Covered California may at its sole option correct an error based on that established intent.
2. Covered California may at its sole option correct obvious clerical errors.
3. A Bidder may modify a bid or submit a new bid after submission by withdrawing its original bid and resubmitting a new bid prior to the bid submission deadline. Bidder modifications offered in any other manner, oral or written, will not be considered.
4. Covered California reserves the right to reject any bid that does not satisfy the requirements set forth in the RFP. Covered California is not required to award a contract. Before submitting a response to this RFP, Bidders should review, correct all errors, and confirm compliance with the RFP requirements.
5. All proposals must be based on the Model Contract provided within the Exhibits section of this solicitation. **Bidders must submit, as part of their Stage 3 Financial Package response, any exceptions to the Model Contract that they wish to negotiate.** Bidder exceptions must be documented in the Model Contract Exhibits using track changes. No additional exceptions may be presented during contract negotiations.
6. No oral understanding or contract shall be binding on either party.

Covered California reserves the right to contact Bidders at any stage of the proposal process to collect additional clarifying information, if deemed necessary.

## **E. Property of Covered California**

Submission materials will not be returned to the Bidder. All proposed ideas or adaptations of the ideas contained in any submission become the property of Covered California and Covered California reserves the right to use them. Acceptance or rejection of the submission will not affect this right in any way.

## **F. Cost of Submissions**

Costs for developing and submitting proposals or attending the Bidders' Conference are entirely the responsibility of the Bidder and shall not be chargeable to Covered California.

## **G. DVBE and Small Business Participation**

### **1. DVBE Declaration & Incentive**

Covered California has established participation goals for DVBEs, as defined in the California Military and Veterans Code, of at least three percent of overall dollars expended for contracts annually. Covered California determines whether to include DVBE participation requirements in specific solicitations based on the availability of contracting or subcontracting opportunities within the scope of services of the particular contract.

While Covered California has not established a DVBE participation requirement for this solicitation, in order to encourage DVBE participation, excluding media placement costs, Covered California has applied a DVBE incentive.

Participation in this program is **OPTIONAL**.

### **2. Small Business (SB) Preference & Incentive**

Based upon the nature of goods and services to be utilized under this solicitation (as outlined in the Scope of Work, Exhibit A), Covered California has set a Small Business Preference goal of 25 percent, excluding media placement costs, for utilization of small businesses as subcontractors under the contract resulting from this solicitation.

Participation in this program is **OPTIONAL**.

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## V. CONTRACT AWARD

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### A. Notice of Intent to Award

Award of the contract, if awarded, will be to the most responsive and qualified Bidder based on scoring criteria detailed in Section III. If two or more finalists are tied, Covered California, at its sole discretion, may request a best and final offer for a Cost Proposal from each finalist.

A Notice of Intent to Award identifying the selected contractor will be posted on the HBEX website and at the entrance of the Covered California headquarters for a period of five working days prior to the protest deadline. All finalists that participated in the final stage held will be notified by email regarding the contract award decision.

### B. Confidentiality of Financial Records

Financial records received by Covered California will be kept confidential and will be destroyed at the time of the Contract Award.

### C. Exemption of Public Records Act

Government Code Section 100508(a)(1) exempts from disclosure under the Public Records Act all deliberative processes, communications, or portions of negotiations with entities contracting or seeking to contract with Covered California and entities with which Covered California is considering a contract.

### D. Covered California Rights

#### 1. Rejection of All Proposals

Issuance of this RFP in no way constitutes a commitment by Covered California to award a contract. Covered California reserves the right to reject any or all proposals or portions of proposals received in response to this RFP, or to amend or cancel this RFP at any time if it is in the best interest of Covered California to do so. In the event of such cancellation, Covered California may reissue the RFP at a later date.

Proposals received after the expiration of the deadline will not be considered or submitted to the Evaluation Team for review.

#### 2. Verification of Bidder Information

By submitting a proposal, Bidders agree to authorize Covered California to:

- a. Verify any and all claims made by the Bidder including, but not limited to verification of prior experience and the possession of other required qualifications.
- b. Check any reference identified by a Bidder or other resources known by the State to confirm the Bidder's business integrity and history of providing effective, efficient,

competent, and timely services.

Covered California reserves the right to reject a proposal based on the Bidder's failure to comply with a requirement in a prior contract, or cooperative agreement with the State of California.

### **3. False or Misleading Statements**

Proposals which contain false or misleading statements, or which provide references which do not support an attribute or condition claimed by the Bidder, may be rejected. If, in the opinion of Covered California, such information was intended to mislead Covered California in its evaluation of the proposal, and the attribute, condition, or capability is a requirement of this RFP, it will be the basis for rejection of the proposal.

### **4. Nonresponsive Proposals**

A proposal may be deemed nonresponsive and subsequently rejected if any of the following occurs:

- a. At any time a submission is received after the exact time and date set forth in Section I.N., "Key Action Dates," for receipt of each submission.
- b. The Bidder fails to meet any of the eligibility requirements as specified in Section II.B., "Stage 1: Eligibility and Capabilities Requirements."
- c. The Bidder fails to submit or fails to complete and sign required Attachments as instructed in this RFP.
- d. The submission contains false, inaccurate, or misleading statements or references.
- e. The Bidder is unwilling or unable to fully comply with the proposed contract provisions.
- f. The Bidder supplies conditional cost information, incomplete cost information, or cost information containing unsigned/uninitialed alterations or irregularities.

### **E. Protests**

Only Bidders that participate in Stage 3 of the RFP may protest the contract award. If a Bidder believes that Covered California's selection of another Bidder was arbitrary and capricious or Covered California committed an error in the bid process sufficiently material to justify invalidation of the proposed award, a Bidder may submit a protest as described below.

Protests will be heard and resolved by the Covered California Chief Deputy Executive Director, or his or her designee. All protests must be made in writing, signed by an individual who is authorized to contractually bind the Bidder, and contain a statement of the reason(s) for protest, citing the law, rule, regulation, or procedures on which the protest is based. The protester must provide facts and evidence to support their claim. Certified or registered mail must be used unless delivered in person, in which case the

protester should obtain a receipt of delivery. The final day to receive a protest is five business days after the Intent to Award has been posted. Protests must be mailed or delivered to:

<b>Mailing Address:</b>
California Health Benefit Exchange Attention: Chief Deputy Executive Director 1601 Exposition Blvd. Sacramento, CA 95815

**F. Contract Execution**

Covered California will confirm the contract award to the winning Bidder after the protest deadline, if no protests are filed, or following the resolution of all protests. The selected Contractor will provide advertising and marketing services to Covered California and will be required to execute a contract that details the legal and programmatic obligations of each party. The contract number will be 14-C-034.

The successful Bidder must enter into a formal contract with Covered California in order to receive payment for services rendered. The contract may incorporate, as an exhibit or by reference, portions of this RFP and responses to this RFP that directly identify the work to be performed, performance time lines, methods and approaches, budget or cost details, or other mandatory contract and performance requirements.

The successful Bidder shall enter into a contract with Covered California no later than ten business days after the Bidder receives the contract from Covered California, and must agree to the terms and conditions outlined in the model contract attached to this RFP.

**G. Payment and Invoicing**

Payment to Contractor is contingent upon Covered California's receiving funding from the Federal government and the collection of fees assessed from the Qualified Health Plans. Covered California shall bear no liability or responsibility for payment to Contractor, even for services provided and delivered, in the event payment to Covered California from the Federal government or the collection of fees assessed from the Qualified Health Plans is delayed, suspended, or terminated.

The Contractor may invoice Covered California only after the successful completion and acceptance of the required work, according to the schedule detailed in the Contract. The Contractor may not invoice Covered California for any costs exceeding the maximum amount identified to complete a deliverable.

## **H. Contract Amendment**

Covered California may, at its sole discretion, extend the term of the contract for an additional two (2), one (1) year extensions under the same terms and conditions, including pricing terms. If mutually agreed upon by the State and the Contractor, this Agreement shall be amended to include additional services and funding.

## **I. Contract Forms and Exhibits**

The selected Contractor must complete and submit to Covered California the “Payee Data Record” Form (Attachment 15) and “Form 700 Statement of Economic Interest Certification” (Attachment 16) after the “Notice of Intent to Award” is posted.

State contract forms and exhibits are available on the HBEX website. Bidders should consider the Model Contract provided within the Exhibits section of this solicitation in preparing its response and ensure they will be able to comply with State contract terms. The contract resulting from this solicitation will be prepared on a “Standard Agreement” (Form STD 213).

Covered California reserves the right to adjust the language in the contract awarded from this solicitation. Therefore, final contract language may deviate from the provisions provided.

If an inconsistency or conflict arises between the terms and conditions appearing in the final contract and the proposed terms and conditions appearing in this solicitation, any inconsistency or conflict will be resolved by giving precedence to the final contract.

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## VI. ATTACHMENTS TABLE OF CONTENTS

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To view the following documents, go to the HBEX Solicitations website, click on the “Details & Downloads” link under RFP 2014-20, and open the selected Attachment documents.

### STAGE 1

- Attachment 1: Proposal Cover Page
- Attachment 2: California Office and Gross Billings Certification
- Attachment 3: Guaranty
- Attachment 4: Conflict of Interest
- Attachment 5: Federal Debarment, Suspension, Ineligibility and Voluntary Exclusion
- Attachment 6: Bidding Agency Fact Sheet
- Attachment 7: Proposed Subcontractor Advertising Agency Fact Sheet

### STAGE 2

- Attachment 8: Proposed Account Staffing Chart
- Attachment 9: Client References

### STAGE 3

- Attachment 10: Advertising Cost Proposal
- Attachment 11: Bankruptcy and Litigation Disclosure
- Attachment 12: Disabled Veteran Business Enterprise Participation Incentive  
*(to be completed only if applicable)*
- Attachment 13: DVBE Declarations *(to be completed only if applicable)*
- Attachment 14: Small Business (SB) Participation *(to be completed only if applicable)*

### TO BE COMPLETED BY SELECTED BIDDER AT TIME OF CONTRACT

- Attachment 15: Payee Data Record
- Attachment 16: Form 700 Statement of Economic Interest Certification

Required But Not Attached:

Certificate of Liability Insurance demonstrating coverage equal to or greater than \$1,000,000

Proof of Workers' Compensation Liability Insurance

Errors and omissions insurance presently in effect for the Contractor of no less than \$1,000,000 per occurrence

Automobile liability, including non-owned auto liability, of \$1,000,000 per occurrence for persons used by Contractor for services provided pursuant to this Agreement



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## VII. EXHIBITS TABLE OF CONTENTS

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To view the following documents, go to the HBEX Solicitations website, click on the “Details & Downloads” link under RFP 2014-20, and open the selected Exhibit documents.

Model Contract:

Standard Agreement Form STD 213

Exhibit A: Scope of Work

Exhibit B: Budget Detail and Payment Provisions

Exhibit B, Attachment 1: Budget Summary Mark-Up Rates

Exhibit C: General Terms and Conditions

Exhibit D: Special Terms and Conditions

Exhibit E: Additional Provisions

Exhibit E, Attachment 1: Résumés

Exhibit F: Travel Reimbursement Information

Exhibit G: Contractor Release Form

Exhibit H: Privacy and Security Requirements