



**COVERED  
CALIFORNIA**

**Request for Proposal  
RFP 2014-18: Public Relations Campaign**

**California Health Benefit Exchange  
Covered California™**

**March 16, 2015**

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

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## TABLE OF CONTENTS

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<b>I. GENERAL INFORMATION .....</b>	<b>4</b>
A. Background.....	4
B. Purpose .....	5
C. Goals. ....	5
D. Objectives .....	6
E. Who May Submit a Proposal .....	7
F. Contract Term .....	7
G. Anticipated Funding .....	8
H. Scope of Work .....	8
I. Subcontractors.....	8
J. Embedded Onsite Staff .....	8
K. Reassignment of Personnel .....	9
L. Nonexclusive Rights.....	9
M. News Releases and Social Media .....	9
N. Key Action Dates .....	10
O. Bidders' Conference and Registration .....	10
<b>II. PROPOSAL SUBMISSION AND STAGES .....</b>	<b>11</b>
A. Overview.....	11
B. Stage 1: Eligibility and Capabilities Requirements.....	11
C. Stage 2: Site Visit, Agency Presentations, Client References and Account Staffing Proposal.....	14
D. Stage 3: Oral Presentations and Financial Package.....	17
<b>III. EVALUATION PROCESS &amp; CRITERIA .....</b>	<b>19</b>
A. Best Value Analysis .....	19
B. Rating Chart.....	20
C. Evaluation Criteria.....	21
<b>IV. SUBMISSION REQUIREMENTS .....</b>	<b>24</b>
A. Format Requirements .....	24
B. Submission of RFP Materials .....	25
C. Importance of Meeting Deadlines.....	25
D. Communication Between Covered California and Bidders .....	25
E. Property of Covered California .....	27
F. Cost of Submissions .....	27
G. DVBE/SB Participation.....	27
<b>V. CONTRACT AWARD.....</b>	<b>28</b>
A. Notice of Intent to Award.....	28
B. Confidentiality of Financial Records & Exemption of Public Records Act.....	28
C. Covered California Rights .....	28
D. Protests.....	29
E. Contract Execution.....	30
F. Contract Forms and Exhibits .....	30
G. Payment and Invoicing.....	31

H. Contract Amendment.....	31
<b>VI. ATTACHMENTS TABLE OF CONTENTS .....</b>	<b>32</b>
<b>VII. EXHIBITS TABLE OF CONTENTS .....</b>	<b>33</b>

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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 (ACA), 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 (CA-ACA).

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

- Reduce the number of uninsured Californians by creating an organized, transparent marketplace for Californians to purchase affordable, high 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:

- The 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).

Covered California has made truly historic reductions in the number of uninsured Californians and has made a giant leap in moving toward a culture of coverage. As of February 15, 2015, Covered California has enrolled nearly 500,000 new consumers into private health plans through Covered California and the number is sure to rise. This brings the total enrollment in Covered California to over 1.4 million. Covered California expanded the network of partners and currently has 14,000 certified insurance agents, nearly 6,500 Certified Enrollment Counselors, 10,000 county eligibility workers, and more than 500 storefronts across the state.

Covered California has a robust online enrollment portal for seamless processing with a streamlined application process, strong online chat function and a pay-as-you-exit option. Covered California's service centers have a strong bilingual capacity to help consumers and dedicated phone lines to serve agents and enrollment counselors. New in 2015 was the issuance of 800,000 1095-A tax statements for consumers. These statements synchronize information from the IRS, health plans, and Covered California.

Initially, efforts were funded through grants from the federal government. However Covered California's future budget will be funded entirely by health plan assessments. This means Covered California will manage an ongoing balancing act of "right sizing" public relations efforts in the context of limited budgets.

## **B. Purpose**

The purpose of this Request for Proposal (RFP) 2014-18 is for Covered California to solicit proposals from qualified public relations agencies in order to award a contract to build upon the strengths and current strategies of the Covered California public relations program while introducing fresh, innovative ideas that will continue to move the organization forward in effective public relations.

The selected Contractor will be expected to create a statewide public relations strategy based on the attached Scope of Work (SOW), which builds upon the strengths and strategies of the current Covered California public relations campaign, while introducing fresh and innovative ideas that will continue to move the campaign forward. Covered California's public relations partner must be able to combine rigorous and insightful account planning and strategic development with effective creative solutions that successfully engage the public, ethnic communities and statewide media to reach Covered California's target populations. They must be willing to work under proscribed strict timeframes and be highly knowledgeable of and sensitive to the dynamic health care reform environment.

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**

The organization's goals are to maximize enrollment, retention of members, inform, and educate Californians, building upon the successful Covered California brand developed over the last three years. Covered California is looking for a dynamic agency with strong, full-service and leading-edge capabilities, including, but not limited to:

- Strategic planning
- Account management
- Event planning and execution
- Media relations
- Material development
- Outreach to multiple populations that reflect the diversity of California

- Development and production of educational videos
- Spokesperson and media training
- Crisis communication
- Development and utilization of social and digital media.

The public relations agency must have proven performance in managing statewide campaigns, working in tight timelines, and have a grasp of the dynamic health care reform environment.

The public relations agency must also have strong project management skills, extensive experience working with California's diverse markets and populations, and the ability to effectively utilize media relations and communications expertise and skill to address priorities for Covered California.

The public relations agency must demonstrate the ability to integrate the efforts of other Covered California-funded projects and statewide advertising within its public relations strategies, outreach and education.

The RFP selection process will focus on the public relations agency's overall capacity, cost efficiencies, team and ability to target relevant populations through strategic public relations efforts.

The selection process will also 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**

Covered California's objectives are to implement a statewide program that will target California's culturally diverse general market, as well as target markets specified by Covered California, in order to educate and motivate Californians to sign up for health care benefits, renew their coverage, and make payments for the coverage selected.

One of Covered California's objectives is to reach target populations which may include language-specific and/or culturally-relevant hard-to-reach populations, including Latinos; Asian communities (Chinese, Vietnamese, and Korean); African Americans; low-to-moderate income (LMI), and Lesbian, Gay, Bisexual and Transgender (LGBT) populations. The successful Bidder may be required to expand on the use of digital platforms to support public relations goals and strategies and to implement activities to reach these markets. Subcontractors must be used if the Bidder does not possess the requisite in-house capabilities.

To be successful, Covered California needs an agency with strong project management skills, the ability to efficiently and effectively manage a team of subcontractors, extensive knowledge of the diverse California media market and the health care reform

environment, and the ability to manage large public relations projects under tight deadlines.

Services shall be provided statewide, with strategic and cost-efficient public relations activities that maximize outreach to all Covered California target markets. See “Subcontractors” on the following page for additional information if the Bidder cannot 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, California-based office since 2010 with minimum **annual gross billings of at least \$1.3 million** in at least two of the past three years.
- A minimum of 15 employees employed from the Bidder’s California office(s) that will service the Covered California account; 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 public relations agencies.

Subcontractors may participate in more than one 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 anticipated term of the contract shall be three years: June 15, 2015 through May 31, 2018. The contract term may change if Covered California makes an award earlier than expected or if Covered California cannot execute the agreement because of unforeseen delays.

Covered California has the option, in its sole discretion, to extend the term of the contract under the same terms and conditions, including pricing terms, for up to two one-year extensions.

The resulting contract will be of no force or effect until signed by both parties. The selected Bidder shall not commence performance until obtained valid contract has been executed between the successful Bidder and Covered California.

## **G. Anticipated Funding**

It is estimated that the initial funding for the contract will be approximately **\$2 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 an estimated \$2 million per year. However, Bidders should not base their proposals 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.

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 execution of a valid contract.

## **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 that the successful Bidder will most likely need to subcontract with one or more agencies with demonstrated knowledge, experience and capability to effectively reach targeted ethnic communities. If the Bidder does not have the full service capabilities to effectively accomplish all components of the SOW, **they are required** to identify potential subcontractors. Each proposed Subcontractor must complete and sign the "Proposed Subcontractor PR Agency Fact Sheet" (Attachment 7).

Covered California reserves the right to deny any or all subcontractors proposed by 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 population and meet Covered California's needs, the Bidder may be required to procure a subcontractor or consultant through a separate competitive process.

## **J. Embedded Onsite Staff**

Covered California reserves the right to require embedded onsite staff reporting to 1601 Exposition Blvd, Sacramento, CA 95815. Serving as project liaisons with the Bidder's office(s), embedded staff duties may include, but are not limited to, consulting and



executing the terms of the SOW in the contract.

**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 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 public relations services during the contract period. Covered California reserves the right to acquire public relations services 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 neither issue any news release nor make any statement to the news media, or through social media channels, pertaining to this RFP, any proposal, contract, or work resulting therefrom, without first obtaining prior written approval from 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 16, 2015</b>
<b>Registration and Questions for Bidders' Conference Due</b>	<b>March 20, 2015 (by 3:00 p.m.)</b>
<b>Voluntary Bidders' Conference</b>	<b>March 24, 2015</b>
<b>Stage 1 - Eligibility &amp; Capabilities</b>	<b>April 2, 2015 (3:00 p.m.)</b>
<b>Stage 2 - Webinar</b>	<b>April 10, 2015 (3:00 p.m.)</b>
<b>Stage 2 - Site Visits</b>	<b>April 28, 29, and 30, 2015</b>
<b>Stage 3 - Financial Package Due</b>	<b>May 12, 2015 (by 3:00 p.m.)</b>
<b>Stage 3 - Oral Presentations</b>	<b>May 14, 2015</b>
<b>Notice of Intent to Award</b>	<b>May 18, 2015</b>
<b>Estimated Start Date of Contract</b>	<b>June 15, 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. *For assistance with the Covered California website, please email [HBEXsolicitation@covered.ca.gov](mailto:HBEXsolicitation@covered.ca.gov).*

## O. Bidders' Conference and Registration

Covered California will conduct a **voluntary** pre-proposal Bidders' Conference on March 24, 2015 from 1:30 to p.m. 3:30 pm 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 who wish to attend are **required**, however, to register via the email address listed in Section IV.B. by March 20, 2015 no later than 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 20, 2015 no later than 3:00 p.m.

Remarks and explanations expressed during the Bidders' Conference do not take

precedence over the written provisions in the RFP documents posted on the HBEX website and are not binding unless confirmed in writing by Covered California and posted on the HBEX website <http://hbex.coveredca.com/solicitations/> .

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## II. PROPOSAL SUBMISSION AND 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. 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, 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). A person authorized to bind the Bidder must sign the form. If the Bidder is a corporation, a person authorized by the corporation to sign on behalf of the Bidder’s Board of Directors must sign the “Proposal Cover Page.”

#### 2. California Office(s) and Gross Billings

##### Instructions:

- Complete and sign the “California Office and Gross Billings Certification” Form (Attachment 2) certifying that the Bidder has a currently operating, full-service

California-based office that has been in business since January 1, 2010, or earlier, and capable of providing services for the term of the proposed contract.

- Attachment 2 also provides certification that the Bidder had **at least \$1.3M in gross billings per year** for two of the three years prior to 2015 from its California-based office(s) that would provide services to Covered California. Include in the document actual billings for each year and indicate whether they are calculated on a calendar or fiscal year basis.

### **3. Guaranty**

#### Instructions:

- Complete and sign the “Guaranty” Form (Attachment 3) from the Bidder, or Parent Corporation if the Bidder is a subsidiary, which ensures that all obligations of a contract awarded from this RFP would be performed, that the Bidder is financially stable and solvent, and has adequate cash reserves to meet all financial obligations while awaiting reimbursement from the State.

### **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), certifying that neither the Bidder nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

### **6. Agency Capabilities Overview**

#### Instructions:

- Complete a narrative response to Items **a** and **b** below: see Section IV for format requirements.

#### **a. Agency Strengths and Experience** (five pages maximum)

##### Instructions:

Provide a narrative addressing the following: describe the various services offered by your agency and experience at a statewide level providing public

relations services; describe the services and experience of the proposed California based office(s) only during the past three years managing accounts similar to the size and scope of the contract to be awarded from this RFP:

- 1) Strengths. Describe the strengths of your agency and experience with public relations and outreach to diverse populations during the past three years, including accomplishments, innovative strategies, account leadership, and experience working on accounts of similar size or scope.
- 2) Agency Experience. Describe your agency's capabilities, skills and experience, with statewide public relations campaigns. Specifically describe your capabilities performing the following services, including, but not limited to: account management; public relations research and strategic planning; earned media development and evaluation; planning and execution of press events both in English and non-English media; crisis management; digital platform/social media as a public relations vehicle.

Also describe your agency's experience in creating an annual public relations plan. Include the steps taken to create the plan, the client's involvement, the political context and why this experience is relevant to what Covered California does.

- 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 and media outlets in California, including the utilization of in-language ethnic media outlets. Include research, planning, execution, and evaluation processes as they relate to client needs and objectives. If your agency does not have such experience in-house, or if in-language experience is limited, describe how your agency would ensure that expertise to address targeted ethnic markets would be provided for the contract needs. Provide evidence of a proven record of success in specific communities.
- 4) Digital Public Relations Services. Describe your agency's experience utilizing various social media vehicles (e.g., Twitter, Facebook, Tumblr) or any others in public relations activities. For each client, indicate whether you created, managed, consulted, or assisted the channel for the client.

#### **b. Public Relations Agency Fact Sheets**

##### Instructions:

- Complete and sign the "Public Relations Agency Fact Sheet" Form (Attachment 6).
- Have each proposed Subcontractor complete and sign the "Proposed PR Agency Subcontractor Fact Sheet" Form (Attachment 7).

## C. Stage 2: Site Visit, Agency Presentations, Client References 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 visit will include meeting with those who would be assigned to the account. The time limit for each site visit is **two 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 tour. 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, Bidders receiving a minimum overall rating of "Exceeds" will advance to Stage 3. Bidders 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 10, 2015 at 3:00 p.m. The purpose of the webinar is to discuss objectives for the Site Visits, introduce and clarify the Public Relations Assignment that is part of the Site Visit and answer questions from Bidders. No evaluations will be made during the 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 at a later time.

### 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 and time limits.

#### a. Agency Overview Presentation

##### Instructions:

- Provide a brief presentation that highlights the capacity and working style of the agency's California-based office(s), particularly those who would lead or interact with Covered California or be assigned to the account. Proposed team members should provide an understanding of the agency's strategic and creative public relations capabilities and earned media experience, digital experience and ethnic public relations experience. In addition, the agency's philosophy, specific strengths and collaboration style with the client and their subcontractors should be discussed.

## **b. Case History Presentation**

### Instructions:

- Select one recent public relations campaign with a multi-cultural focus that a California-based team designed and implemented. Present the details from beginning to end.

The presentation must, at a minimum, include:

- 1) Timeline and process, including details on planning, goals and objectives. Note whether the campaign was proactive or reactive.
- 2) Key facts from public relations research and analysis.
- 3) Identification of target markets, including approximate audience size, age, range, socioeconomic status, language, culture/ethnicity, and geographic location. Include how messages were tailored and delivered to the target audience(s) and why.
- 4) A statewide, large scale, campaign kickoff media tour that includes media outreach plan strategy, press kit, other briefing materials or assets and secured media coverage and cost. Include the budget for the project. Note the level of client collaboration and participation.
- 5) Challenges or other considerations and details, (e.g., detailed budget, timeline, competition, organizational and background research, environmental constraints and level of client involvement).
- 6) How the campaign was evaluated, the results obtained, and how results impacted your client's business objectives.
- 7) Current agency staff who worked on this campaign and their roles.

## **c. Public Relations Assignment Presentation**

### Instructions:

- An assignment to address specific challenges or issues that Covered California faces will be sent separately to all Bidders that advance to Stage 2. Bidders may be asked to present potential strategies and messages that demonstrate their ability to communicate complex information effectively in a dynamic, fast moving external environment.

## 2. Account Staff Proposal (three 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 your California office(s). Include photos for those who would service the account and their titles.

#### b) Primary Account Staffing Summary

Complete the "Proposed Account Staffing Chart" (Attachment 8), not to exceed two pages, identifying the proposed primary day-to-day account staff who will be assigned to the Covered California account. Include the total number of current full-time account employees in the California office(s). Please include a photo of each proposed account staff member with the name, title, as well as those of others who will be present during the Site Visit. Include the following information for 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) Highlight the day-to-day lead account staff member and their duties.
- 4) Specific training or expertise that is relevant and would be helpful to the Covered California account.
- 5) Identify any vacancies or positions which would be filled or created upon award of the Covered California account. Indicate the percentage of time each would be dedicated to the Covered California account.

## 3. Client References (two 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 on or around May 4, 2015 to schedule a time for the oral presentation at Covered California headquarters in Sacramento scheduled for May 14, 2015. . A general overview of the format and expectations of the Financial Package are provided below.

Scoring: Stage 3 presentations will be reviewed and evaluated by the Covered California Evaluation Team using the Rating Chart shown in Section III, Evaluation Process & Criteria. Items 1b and 1c below will be scored on a pass/fail basis. Incentives for certified Disabled Veteran Business Enterprises and Small Business Enterprises 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 2014-18 Public Relations Campaign” via courier or overnight service by May 12, 2015, no later than 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 “Public Relations 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)**

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. Public Relations 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.

### b. Time Limit

The time limit for each presentation is **2 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 public relations account management, embedded staff and any supportive personnel staff must play a major role in the presentation. Limit those who attend to no more than ten staff members in total from the bidding agency (including proposed Subcontractors). At least one representative from each Subcontractor who 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 contracts to the responsible Bidder

submitting the best value proposal that maximizes the benefits to Covered California in relation to the areas of competence, experience, and timely performance; 2) act to promote and ensure integrity, honesty, and fairness in the operation and administration of Covered California; and 3) the objective of maximizing 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:

Rating	Definition
<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>➤ <b>Agency Structure and Strengths</b><ul style="list-style-type: none"><li>○ Demonstrates strong ability to service Covered California, through its effective public relations capacity, unique services, and account leadership.</li><li>○ Demonstrates efficient structure of the agency and account teams.</li><li>○ Demonstrates strong capacity and experience to deliver a broad range of strong public relations services on a local and statewide level necessary to meet the requirements of the SOW.</li><li>○ Highlights key contributions that would be valuable to Covered California.</li><li>○ Proposed Subcontractor displays appropriate experience, skill and expertise to reach designated populations.</li></ul></li><li>➤ <b>Diverse Population Public Relations and Outreach</b><ul style="list-style-type: none"><li>○ Demonstrates the experience and a proven record of reaching specific ethnic, economic, and/or culturally diverse populations.</li><li>○ Clearly identifies which services would be performed through its subcontractors.</li></ul></li><li>➤ <b>Digital Media Platforms for Public Relations</b><ul style="list-style-type: none"><li>○ Demonstrates an understanding and capability to effectively utilize various digital media vehicles and has used them in past public relations efforts effectively.</li></ul></li><li>➤ <b>Strategic Planning</b><ul style="list-style-type: none"><li>○ Demonstrates experience in public relations strategic planning and working collaboratively with the client during the process.</li></ul></li><li>➤ <b>PR Agency Fact Sheet</b><ul style="list-style-type: none"><li>○ Demonstrates that its turnover of accounts is at a reasonable rate and has overall strong client retention.</li><li>○ Demonstrates adequate staffing with the number of full-time employees assigned to existing and/or past accounts.</li><li>○ Describes experience in the last three years with accounts of similar size and services as the Covered California account which includes personnel of the California office that would service the account.</li><li>○ Bidder has a range of accounts with a specific focus on cause-related public relations, a health focus, and/or targeted outreach.</li><li>○ Demonstrates that proposed subcontractors have sufficient experience and skill to reach designated target populations.</li></ul></li></ul>

## Stage 2: Site Visit & Account Staffing Proposal

- **Agency Overview Presentation**
  - Demonstrates strengths and a working style compatible with Covered California's.
- **Case History Highlighting Campaign Kickoff**
  - Identifies the objectives, target market, and anticipated reach.
  - Bidder considered cultural appropriateness and tailored message for the target audience(s).
  - Campaign is well-rounded with multiple elements and strategically thorough, including the use of budget.
  - Demonstrates strong capacity to strategize, plan, conduct and complete a media event within desired budget parameters.
  - Demonstrates strong media relations capabilities, the ability to achieve the desired results and appropriate clients collaboration and participation.
  - Demonstrates the capacity to execute the campaign and strategically achieve the goal(s).
  - Bidder is strategic overall, achieving the campaign objectives and reaching the desired public impact.
- **PR Assignment Presentation**
  - Showcases the overall ability to develop, implement, and evaluate a public relations campaign for Covered California.
  - Demonstrates high-caliber strategic abilities and utilization of media relations and digital platform skills.
  - Bidder and/or its proposed subcontractors demonstrates the ability to maximize reach of the multicultural general and ethnic market.
- **Proposed Account Staffing**
  - Identifies highly capable staff who have the expertise, training, skills and experience consistent with the account management and public relations needs identified in the SOW.
  - Cost competitive staffing structure and sufficient time dedication.
  - Clearly identifies vacancies that would be filled or positions that would be created to service the Covered California account, including the time dedicated and role.
  - Proposed percentage of time dedicated to the Covered California account is sufficient to meet the needs identified in the SOW.
  - Identifies the day-to-day lead who demonstrates skills, experience and other qualifications to effectively lead and manage Covered California's Scope of Work.

### Stage 3: Financial Package & Oral Presentations

**Bidder has the most effective and experienced combination of public relations staff, and multi-ethnic expertise to help Covered California achieve its public relations goals.**

➤ **Cost Proposal Assignment**

- Demonstrates it provides the best value for the services through a Cost Proposal that is cost-effective and cost-competitive.
- Financial Records (pass/fail)
- Ability to quickly display an experienced, talented team of account management who can effectively deliver in California's fast-paced environment.
- Demonstrates ability to deliver a cost-effective arrangement for outsourcing to Subcontractors.

➤ **Oral Presentation**

- Demonstrates a high level of strength in all aspects of public relations capabilities, including research, strategic planning, execution and evaluation.
- Has the ability to sustain both short- and long-term campaigns and capacity to innovate and adapt to the changing environment.
- Has the ability to successfully outreach to socially, economically and culturally diverse populations.
- Understands Covered California's business objectives and demonstrates ability to develop public relations that support those objectives.
- Demonstrates a collaborative style, philosophy, and process with clients.
- Demonstrates flexibility in adjusting public relations campaign elements based on Covered California's feedback and changing needs.

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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 2014-18: Public Relations California Health Benefit Exchange Covered California Attention: Mr. John Chermesino 1601 Exposition Blvd Sacramento, CA 95815 DO NOT OPEN	Email: <a href="mailto:hbxsolicitation@covered.ca.gov">hbxsolicitation@covered.ca.gov</a>  Subject Line <b>must</b> include: “RFP 2014-18”

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 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 clarification is required 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 RFP 2014-18, 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 with 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. All Model Contract exceptions must be

included in the Bidder Proposal at the time of its submission. 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/SB 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, 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 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

The contract, if awarded, will be awarded to the most responsive and qualified Bidder as indicated in the evaluation criteria. 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 & Exemption of Public Records Act

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

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. Included within the exemption, but not limited to, are score sheets and proposals submitted by Bidders and any evaluation of a contract. Covered California may, at its discretion, waive this exemption.

### C. 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. Covered California may, at its sole discretion, cancel this RFP after the receipt of Stage 1 submissions if the number of submissions is inadequate or if there is insufficient competition among qualified Bidders. 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/or not initialed alterations or irregularities.

### **D. 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 Notice of 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

#### **E. Contract Execution**

The Bidder selected to provide public relations services to Covered California will be required to execute a contract that details the legal and programmatic obligations after the protest deadline, if no protests are filed or following the resolution of all protests. The contract number will be 14-C-035.

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 should enter into a contract with Covered California no later than ten State working days after the Bidder receives the contract from Covered California, and must agree to the terms and conditions outlined in the contract language.

Covered California reserves the right to terminate the contract, with or without cause, or if the Contractor fails to uphold the terms or performs unsatisfactorily. If this occurs, Covered California reserves the right to select the next highest-ranked proposal which conforms to the requirements of this RFP and represents, in the sole discretion of Covered California, the best-value proposal that maximizes the benefits to the Covered California.

If changes are required by legislation, court action, or other administrative action affecting Covered California, the contract, as applicable, will be amended or terminated accordingly in order to comply with these actions.

#### **F. Contract Forms and Exhibits**

The selected Contractor must complete and submit to Covered California the "Payee Data Record (STD 204)" Form (Attachment 15) and "Form 700 Statement of Economic Interest Certification" Form (Attachment 16) after the "Notice of Intent to Award" is posted.

State contract forms and exhibits are available on the HBEX website at <http://hbex.coveredca.com/solicitations/>. Bidders should consider the "Model Contract" in 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 RFP will be prepared on a "Standard Agreement" (Form STD 213).

Covered California reserves the right to modify the language in the contract awarded from this RFP. 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 RFP, any inconsistency or conflict will be resolved by giving precedence to the final contract.

#### **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 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 Covered California and the Contractor this Agreement shall be amended to include additional services and funding.

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## VII. ATTACHMENTS TABLE OF CONTENTS

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To view the following documents, go to the HBEX website, <http://hbex.coveredca.com/solicitations/>, select the Solicitations section, click on the “Details & Downloads” link under RFP 2014-18, 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 Certification
- Attachment 5: Federal Debarment, Suspension, Ineligibility and Voluntary Exclusion Certification
- Attachment 6: Public Relations Agency Fact Sheet
- Attachment 7: Proposed Subcontractor PR Bidding Agency Fact Sheet

### STAGE 2

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

### STAGE 3

- Attachment 10: Public Relations Agency Cost Proposal
- Attachment 11: Bankruptcy and Litigation Disclosure
- Attachment 12: Disabled Veteran Business Enterprise (DVBE) Participation Incentive Program (*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 Successful 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 website:  
<http://hbex.coveredca.com/solicitations/>, select the Solicitations section, click on the “Details & Downloads” link under RFP 2014-18, 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: Hourly 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’s Release Form

Exhibit H: Privacy and Security Requirements