

# Advertising & Marketing Services Request for Proposals 2019-07 Bidders' Conference



*September 11, 2019*

# Agenda

**Introductions – Colleen Stevens**

**Welcome – Peter Lee**

**Organization & Marketing Campaign Overview – Yuliya Andreyeva**

**Looking Forward – Michael Brennan**

**RFP Overview – Amy Wilson**

**Q&A Session – Colleen Stevens**

Welcome  
**Peter Lee**



# Covered California's Vision and Mission

## **Vision:**

To improve the health of all Californians by assuring their access to affordable, high-quality care.

## **Mission:**

To increase the number of insured Californians, improve health care quality, lower costs and reduce health disparities through an innovative, competitive marketplace that empowers consumers to choose the health plan and providers that give them the best value.

# Covered California's Strategic Pillars

## AFFORDABLE PLANS

Consumers purchase and keep Covered California products based on their perception that this is a good value for them.

## NEEDED CARE

Consumers receive the right care at the right time.

## EFFECTIVE OUTREACH AND EDUCATION

Consumers understand what we offer and have a positive attitude about Covered California.

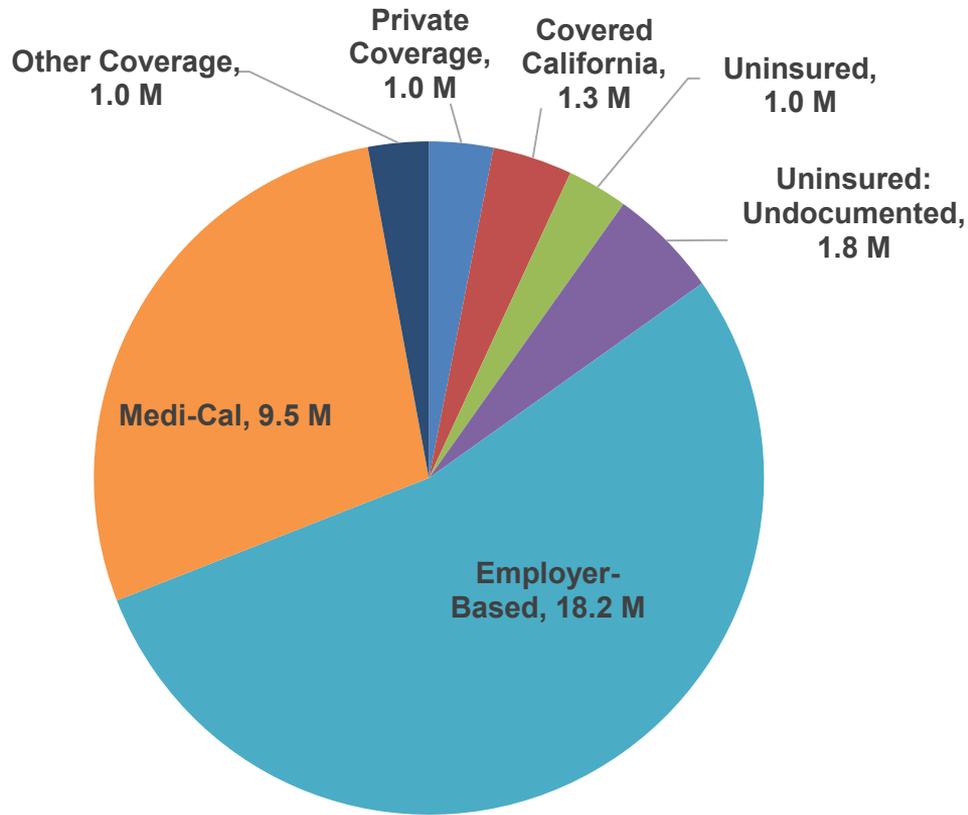
## POSITIVE CONSUMER EXPERIENCE

Consumers have a positive experience from initial enrollment to keeping their coverage.

## ORGANIZATIONAL EXCELLENCE

Covered California has the right tools, processes, and resources to support our team to deliver on our mission.

# California 2016 Sources of Coverage (Age 0-64)\*



\*Notes: Estimates derived from American Community Survey (ACS) for consumers with employer-based coverage, Medi-Cal, or who are uninsured, modified to fit known administrative data for private coverage (from DMHC, CDI, and Covered California). Undocumented estimate is from CalSIM 2.0 is the age 0-64 estimate only and may include consumers who report partial-scope Medi-Cal coverage. The estimates shown for Medi-Cal coverage are lower than administrative data from DHCS – an area of ongoing research.

# Covered California's Key Successes

7



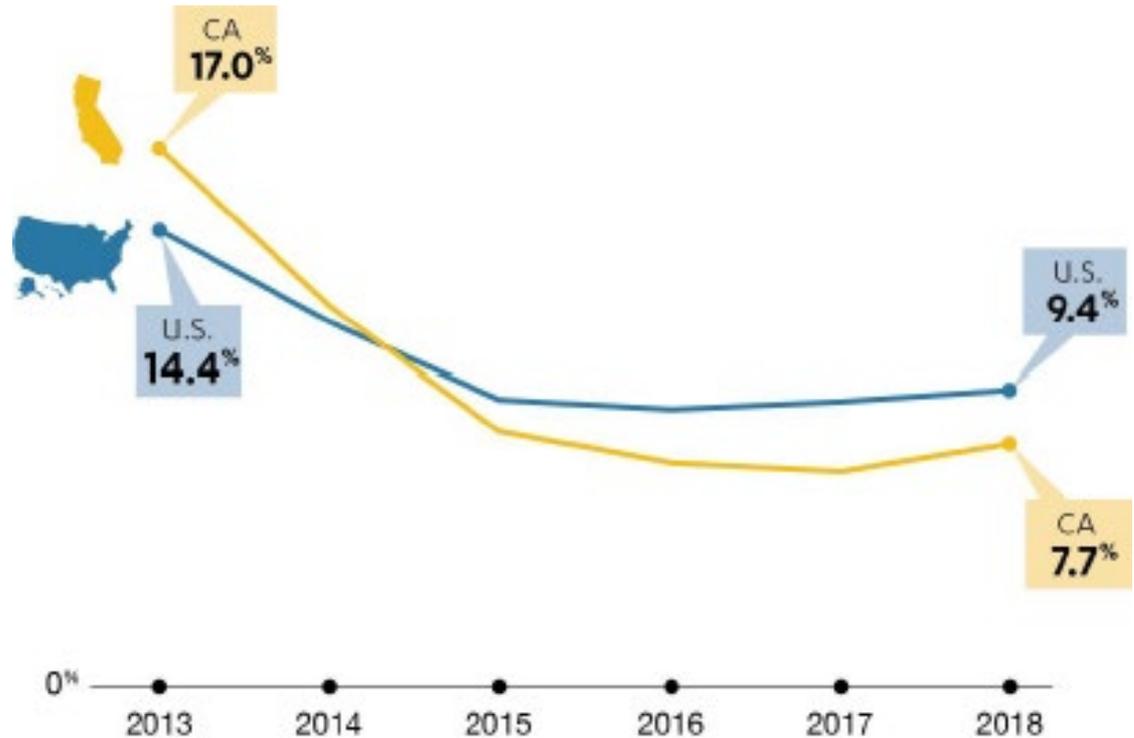
# Covered California's Key Successes

Healthier risk mix  
than the national  
average, resulting in  
more stable rates  
and enrollment



# Covered California's Key Successes

Lower uninsured rate than the national average



# Building on Success

## 7<sup>th</sup> Open Enrollment

State  
based  
mandate

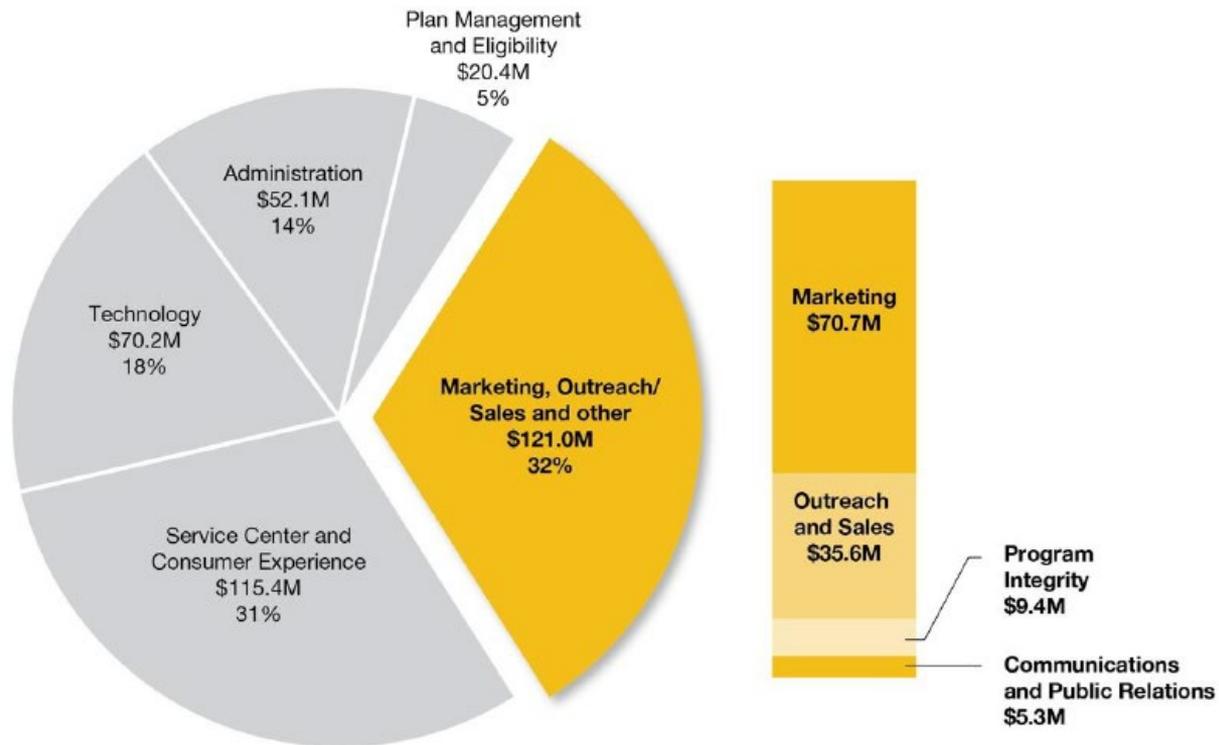
Expanded  
financial  
help

Many will  
see lower  
rates

Expanded  
health plan  
options

# Commitment to Marketing & Outreach

Extensive investment in marketing & outreach – marketing matters



# The Right Marketing Partner

...to build on our  
success to positively  
impact health of all  
Californians



# Helping California Stay Healthy

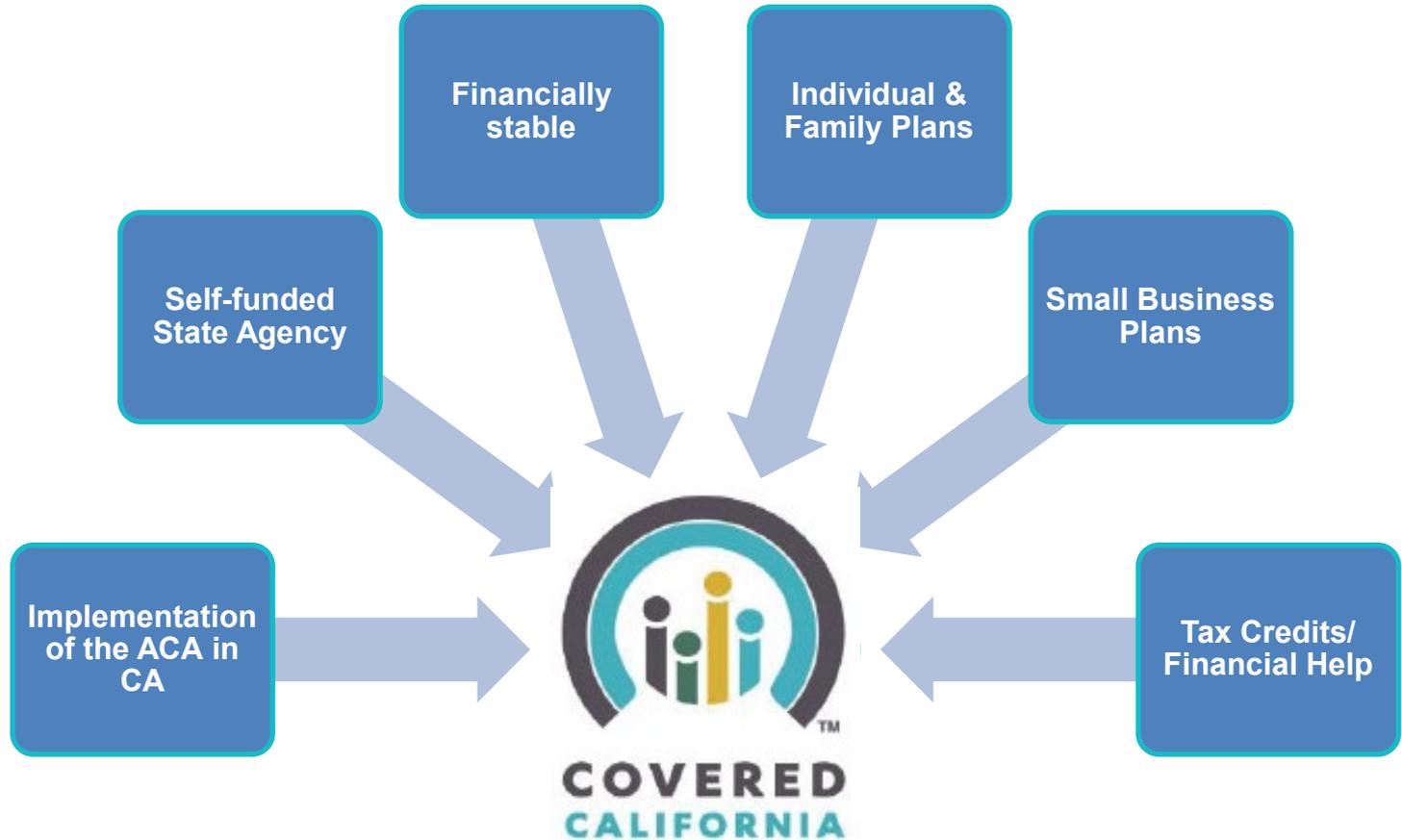


# Organization Overview

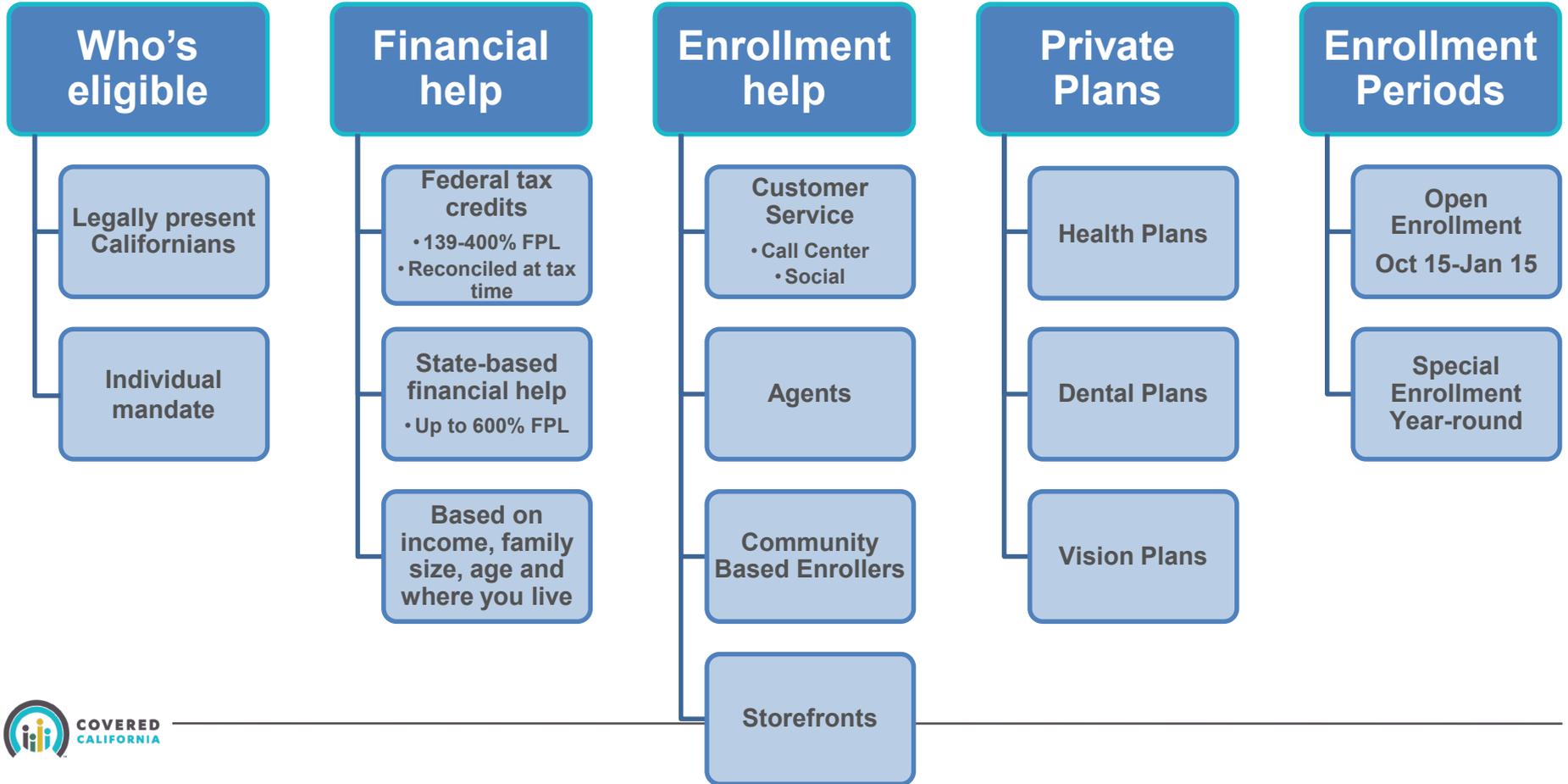
## Yuliya Andreyeva



# Overarching Program Highlights

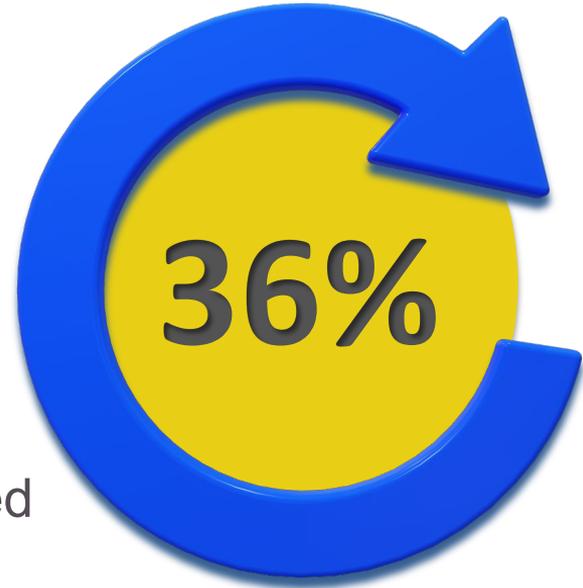


# Individual Market Program



# Individual Market Enrollment Turn

- ❖ 1.39 million enrolled as of March '19
- ❖ Approx. 36% disenroll during the year
- ❖ Most who disenroll (approx. 90%) move to other forms of coverage
- ❖ Ongoing marketing & outreach effort needed to help retain and replenish enrollment



# Small Business Program

- ❖ Designed for businesses up to 100 employees
- ❖ Tax credits available to some businesses
- ❖ Enrollment available year-round



# Marketing Overview

## Yuliya Andreyeva



# Marketing Team



Gianina Frazee

Sarah Stockton

John Reilly

Colleen Stevens



Amy Wilson

Jennifer Miller

Yuliya Andreyeva

Michael Brennan

# Marketing Division Goals

## Increase the number of insured Californians

- Improving **brand awareness & understanding of Covered California's role**
- Understanding **consumer needs**
- Enhancing **consumer experiences**
- Improving consumer perception about the **value and affordability of health insurance**
- Maximizing **acquisition and retention of memberships**

# Open Enrollment Campaign Parameters



## Enrollment window

10/15 – 1/31



## Target Audience

Uninsured Subsidy eligible and non-subsidy eligible CA residents  
A25-64  
HHI \$25K - \$150K



## Segments & Languages

**Multi-Segment** (*English*)  
**LGBTQ** (*English*)  
**Hispanic** (*Spanish*)  
**Asian** (*Chinese – Mandarin, Cantonese, Korean, Vietnamese, Hmong, Laotian, Cambodian*)  
**African American** (*English*)



## Geography

**Statewide CA**  
(*emphasis given to markets with high populations of uninsured and markets with high populations of ethnic sub-segments*)

# Special Enrollment Campaign Parameters



## Enrollment Window

Year-round  
Campaign window  
year-round outside of  
Open Enrollment



## Target

CA residents who  
have experienced a  
qualifying life event  
A25-64  
HHI \$25K - \$150K



## Segments & Languages

**Multi-Segment** (*English*)  
**Hispanic** (*Spanish*)  
**Asian** (*Chinese – Mandarin  
and Cantonese, Korean,  
Vietnamese,*)  
**African American** (*English*)



## Geography

**Statewide CA**  
(*emphasis given to  
markets with high  
populations of uninsured  
and markets with high  
populations of ethnic  
sub-segments*)

# Special Enrollment Qualifying Life Events



Losing your health coverage



Getting married



Permanently moving outside your plan's coverage area



Having a baby



You just turned 26

# How to Apply for Coverage



[www.CoveredCA.com](http://www.CoveredCA.com)

**ONLINE**



**Service Center**  
**(800) 300-1506**

**PHONE**



**Certified**  
*Insurance*  
*Agent*

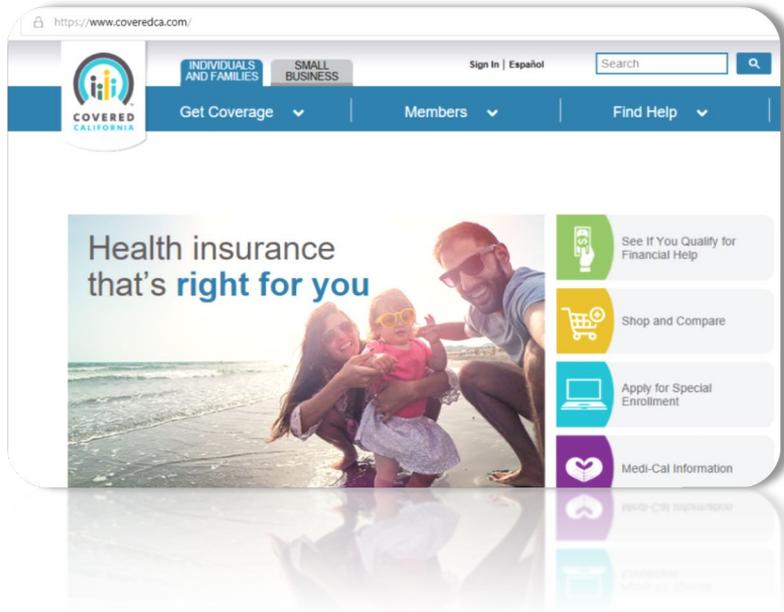
**IN-PERSON**



**Certified**  
*Enrollment*  
*Counselor*

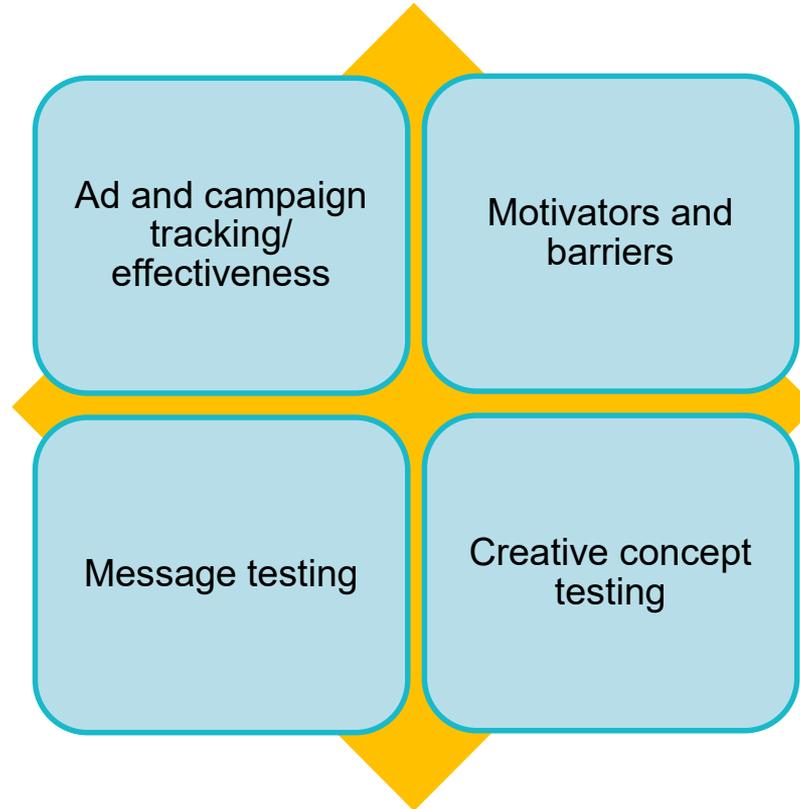
**IN-PERSON**

# CoveredCA.com

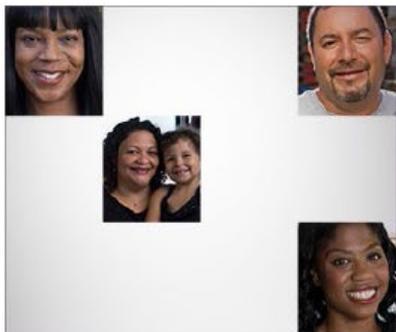


- ❖ Apply online – Shop & Compare
- ❖ Find out if you qualify for financial help
- ❖ Frequently asked questions
- ❖ Find local help
- ❖ Mirror Spanish website and Asian landing pages

# Grounded in Research & Measurement



# Campaign Evolution: Open Enrollments (OE) 1 & 2



# Campaign Evolution: Launch of “Life Care”

Brand  
Strategy/Platform

**IT’S MORE THAN JUST HEALTH CARE, IT’S LIFE CARE**

*Covered California provides more than just health insurance when we’re sick or injured. The plans offered provide free preventive care to help keep us well in the first place. And, you’ll have peace of mind knowing that the cost of being unwell doesn’t ruin this whole life thing.*

**Because it’s more than just health care.  
It’s life care.**

# Campaign Evolution: Open Enrollments (OE) 3-7

Brand  
Strategy/Platform

IT'S MORE THAN JUST HEALTH CARE, IT'S LIFE CARE



## OE3

We helped people see coverage isn't just about caring for their 'health' but their 'lives'... with touch of urgency



## OE4 & OE5

We began to focus on the 'urgency' to get covered; and remind people that life can change in an instant



## OE6

And followed up with urgency alongside a more empathic acknowledgment of customer finances



## OE7

More emphasis on what we can do for the consumer, with more emotional connection to Covered California vs. Insurance

# OE7 Communication Strategy

- ❖ Primarily focus on affordability and expanded financial help
- ❖ Law/mandate message will be included in some media channels, as appropriate, while positioning Covered California as source of help
- ❖ Continue to include core support messages
  - Free enrollment help
  - Free Preventive care
  - Brand-name plans
  - Deadlines
  - Benefit of health insurance
  - Pre-existing conditions covered
  - Dental
  - Metal Tiers

# Looking Forward & Challenges

## **Michael Brennan**



# Growing the Brand

- Established awareness
- Continued education necessary



# Growing the Brand

- Established awareness
- Continued education necessary
- Still explaining who we are and what we offer



# Growing the Brand

- Established awareness
- Continued education necessary
- Still explaining who we are and what we offer
- New this year



# Messaging Challenges & Opportunities

- Open Enrollment



# Messaging Challenges & Opportunities

- Open Enrollment
- Special Enrollment
- Renewal Period
- Retention



# Messaging Challenges & Opportunities

- Open Enrollment
- Special Enrollment
- Renewal Period
- Retention
- Tax Season – 1095-A
- Expanded State Subsidies



# Messaging Challenges & Opportunities

- Open Enrollment
- Special Enrollment
- Renewal Period
- Retention
- Tax Season – 1095-A
- Expanded State Subsidies
- “Shared Responsibility” – Penalty
- Immigration & Confidentiality



# Challenges Moving Forward

- Keep their attention
- Open Enrollment, Retention & Special Enrollment
- Large diverse target populations
- Large geographic area



# Challenges Moving Forward

- Keep their attention
- Open Enrollment, Retention & Special Enrollment
- Large diverse target populations
- Large geographic area
- Sales channel support
- CCSB advertising
- Strategic Planning



# Our Customers

- Appropriate messages for:
  - Members
    - Goal = retention
  - New enrollees
    - Goal = how to use the new insurance plan and remain insured
  - Started enrollment but didn't complete the process
    - Goal = steer them towards enrollment
  - Not enrolled
    - Goal = understand the benefits and explore their options

We  our  
customers

# RFP Overview

## Amy Wilson



# RFP Housekeeping Notes

- Written RFP trumps verbal comments
- Open Procurement
- Email [HBEXsolicitation@covered.ca.gov](mailto:HBEXsolicitation@covered.ca.gov) questions
  - Include “RFP 2019-07 Advertising and Marketing Services” in the subject line
- No phone calls, please

# Covered California Solicitation Website



About



Board



Programs



Stakeholders



Agents



Solicitations



Grants



Resources



Careers

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## Solicitations

### RFP 2019-07 Advertising and Marketing Services

The purpose of this RFP is to solicit proposals from qualified advertising agencies to serve as the Lead Agency to provide multi-segment, integrated communications services through holistic, statewide marketing campaigns with the goal of promoting Covered California's offerings and maximizing the number of Californians enrolled in health insurance coverage.

[Details & Downloads](#)

#### **Details & Downloads:**

- [Addendum 1 RFP 2019-07 Advertising and Marketing Services](#)
- [RFP 2019-07 Advertising and Marketing Services](#)
- [Model Contract](#)
- [Attachments](#)

## Additional Links

- [Solicitations Archive](#)
- [Covered California Procurement and Contracting Manual](#)
- [Covered California Certification of Qualified Health Plans](#)

Check  
often for  
updates!

# Minimum Qualifications

- Full-service advertising agency
  - Focus on capacity of California office(s)
  - One contract with lead agency
- \$100 million minimum in gross billings in at least two of past three years (2016-2018) among all California offices
- Minimum of 50 employees from California office(s)

# Minimum Qualifications

- NO conflicts of interest
  - Please identify if you think you have a conflict of interest
  - No communication or shared resources with other offices that have conflicts

# Other Key Highlights

- Subcontractors may participate in more than one bidding proposal
- More than one bidder with same holding company allowed
  - If no collaboration, shared staff or supervisory relationship

# Contract Funding & Length



- Approximately \$45 million available annually
  - Actual budget may increase or decrease by \$10 to \$15 million per year
  - Includes all costs and fees
  - Includes funding for subcontractors
- Contract term is 5 years and 3 months
  - January 1, 2020 - March 31, 2025
- Two two-year extensions possible

# Scope of Work (SOW)

- The SOW (Exhibit A) will become part of the resulting contract
- SOW is purposefully broad
- Covered California will maintain control over the priority and weight given to each item in the SOW
- Spending, projects and activities confirmed by signed estimates and work orders

# Subcontractors

- Lead agency is required to include subs if needed to fulfill SOW and subs experience must be described
- Must identify if proposing a media buyer and complete Attachment 5, Proposed Subcontractor - Media Buying Agency Fact Sheet
- All other subs to complete Attachment 6, Proposed Subcontractor - Agency Fact Sheet
- Review primarily focused on lead agency
  - Looking at lead agency's capacity to service account and determination of in-house capacity

# Subcontractors

- Award of contract to bidder does not imply approval of:
  - Proposed subcontractors
  - Internal capabilities identified by lead agency to address ethnic campaigns
- If proposed subs or internal ethnic capabilities are denied by Covered California:
  - Separate review process after award
  - Handled by lead agency

# Subcontractors

- **Stage 1** – Subs experience, or the bidding agency's expertise, to reach key targeted populations must be described
- **Stage 2** – At least one sub, but no more than two, representative(s) must attend Site Visit
- **Stage 3** – At least one representative from sub that would staff the account must attend Oral Presentations

# Subcontractors

- Lead agency has sole responsibility for payment of all subcontractors and invoices
  - There will be NO contractual relationship between subs and Covered California

# Key RFP Dates

<b>Stage 1</b>	Eligibility & Capabilities Packages Due	September 26 (1 p.m. PST)
<b>Stage 2</b>	Webinar	October 9
	Site Visits	October 29-31
<b>Stage 3</b>	Financial Package Due	November 20 (1 p.m. PST)
	Oral Presentations (in Sacramento)	December 3-4
<b>Project Contract Start</b>		January 1, 2020

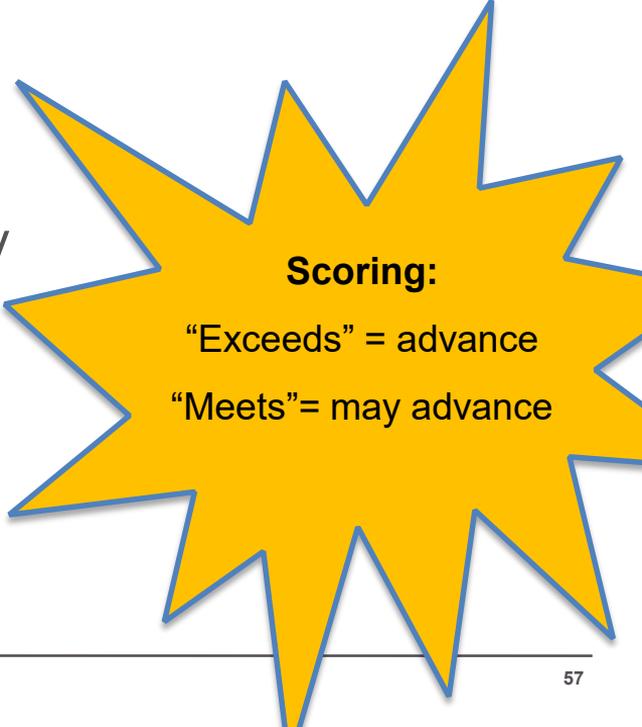
# Stage 1: Document Requirements



<b>Attachment 1</b>	Proposal Checklist
<b>Attachment 2</b>	Proposal Cover Page
<b>Attachment 3</b>	Agency Certification Minimum Qualifications
<b>Attachment 7</b>	Guaranty
<b>Attachment 8</b>	Conflict of Interest Certification
<b>Attachment 9</b>	Bankruptcy and Litigation Disclosure
<b>Attachment 10</b>	Form STD 204 - Payee Data Record
<b>Attachment 11</b>	Contractor Certification Form
<b>Attachment 12</b>	Form 700 Statement of Economic Interest Certification
<b>Attachment 13</b>	Form STD 830 Target Area Contract Preference Act (TACPA)
<b>Attachment 14</b>	Form DGS/PD 526 – Bidder’s Summary of Contract Activities and Labor Hours
<b>Certificates of Insurance</b> (required but NOT an RFP attachment)	Certificate of Liability Insurance; Workers’ Compensation Liability Insurance; Automobile Liability Insurance; Errors and Omissions Insurance

# Stage 1: Agency Capabilities

- Agency Strengths and Experience (5 pages maximum)
- Advertising, Creative and Placement Effectiveness (5 pages maximum)
- Bidding Agency Fact Sheet (Attachment 4)
- Proposed Subcontractor - Media Buying Agency (Attachment 5)
- Proposed Subcontractor - Agency Fact Sheet (Attachment 6)



**Scoring:**

“Exceeds” = advance

“Meets” = may advance

# Stage 2: Site Visit

- Three-hour site visit should include:
  - Office Tour
  - Agency Overview
  - Case History Presentation
  - Advertising Assignment Presentation
  - Q&A Session (at least 20 min.)
  - Creative Reel provided, not shown
- Account Staff Proposal
- Client References



# Stage 3: Financial Package and Oral Presentation

- Two-hour oral presentations in Sacramento
  - Agency Assignment
  - Day-to-day staff must play a major role
  - No more than 10 attend, including subs
- Submit sealed package containing:
  - Financial Records (Due November 20 by 1 p.m. PST)
  - Cost Proposal - Exhibit B, Attachments 1 (Due at Oral Presentation)
- Up to 3 agencies from Stage 2 will participate



**Scoring:**  
Highest rank

# Award of Contract



- Notice of intent to award
  - Post on solicitation website and at the entrance to Covered California for 5 days prior to protest deadline
  - All Stage 3 finalists notified by email
- Protest period
  - 5 day protest period after notice of intent to award
- Estimated contract start date is January 1, 2020

Q&A Session (Part I)  
**Colleen Stevens**



# Break



Q&A Session (Part II)  
**Colleen Stevens**



RFP Reminders  
**Colleen Stevens**



# RFP Reminders



- Read RFP thoroughly & follow instructions
- Check the Covered California solicitation page often for updates
- Read & fill out all forms completely and sign (blue ink!)
- Meet page limitations, number of copies, copy requirements & deadlines
- Email only for questions

# RFP Reminders



- Avoid jargon and acronyms, don't assume
- Identify any conflicts
- Serious about multi-cultural outreach and capabilities
- Level playing field
- Survey at end of RFP process for all participants & debriefing, if requested

# Reminders About Us

- Collaborative (and fun!) client
- High-profile organization
- Hot issue
- Positioned to have major impact on healthcare in California and nationally



*We hope  
you'll want to  
join us!*

Thank You!

