



**Request for Proposal
RFP 2023-03: Media Spend Analysis**

September 26, 2023

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1. INTRODUCTION

1.1 Overview

Potential Proposers are invited to review and respond to this Request for Proposal (RFP). By submitting a proposal, the Proposer organization agrees to the terms and conditions stated in this RFP.

Potential Proposers should carefully read this document and all attachments in their entirety, as they may contain binding provisions that affect the rights and obligations of Proposer organizations. Proposers must comply with the instructions contained in this document. Proposals for this RFP must be submitted to the Covered California contact designated in Section 1.5 below.

1.2 Background

Soon after the passage of 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, also known as Covered California. The California state law is referred to as the California Patient Protection and Affordable Care Act (CA-ACA).

Covered California is the state's health insurance marketplace where Californians can find affordable, quality insurance from top insurance companies. The success of Covered California is built upon its vision to improve the health of all Californians by assuring their access to affordable, high quality health care. Covered California's mission is 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 Marketing Division delivers on the organization's vision and mission via marketing, outreach and education efforts anchored in and responsive to California's ethnic, cultural, regional and language diversity, and require comprehensive marketing campaign strategies to reach and motivate Californians to enroll in or renew health insurance through Covered California. Covered California's marketing campaigns are designed to:

- Maximize acquisition and retention
- Improve brand awareness and understanding of Covered California's role, and position Covered California as the go to resource to get quality health coverage
- Improve consumer perception about the value and affordability of health insurance
- Understand consumer needs and engage with consumers at key decision points in the enrollment journey to help facilitate and enhance consumer experience

Covered California has Open Enrollment period and Special Enrollment period when consumers can compare and purchase health insurance and find out if they qualify for

financial help (or subsidy) to pay for health coverage. The Open Enrollment period is a three-month window that starts on November 1st and ends January 31st. Special Enrollment period is year-round, but one would have to have a qualifying life event to enroll. A few most common qualifying life events driving enrollment during the Special Enrollment period are losing existing health coverage, getting married, permanently moving to or within California, having a baby, or turning 26 and no longer being eligible for parents' health coverage. Through Covered California, consumers can also find out if they're eligible for Medi-Cal and complete that application any time of year.

Open Enrollment paid media campaign leverages a strategic mix of online and offline media channels. The campaign is executed in English, Spanish, Chinese, Korean and Vietnamese languages, and includes some outreach in Hmong and Laotian. Open Enrollment marketing also includes tailored culturally relevant campaigns to reach the Black/African-American and LGBTQ+ communities. The Open Enrollment campaign is statewide with emphasis given to markets with high populations of uninsured and markets with high populations of ethnic and cultural sub-segments. During Open Enrollment, our primary target audience are uninsured subsidy eligible and non-subsidy eligible Californians.

Special Enrollment marketing effort is year-round, except when we're in-market with our Open Enrollment campaign, so there is no overlap. Paid media efforts during Special Enrollment are scaled back significantly compared to Open Enrollment and focus primarily on online media channels. However, the Special Enrollment marketing campaign still targets multi-cultural audiences in English, Hispanic audiences in Spanish, Asian audiences in Chinese, Korean and Vietnamese, and Black/African-American audiences with tailored outreach. The Special Enrollment campaign is statewide, prioritizing markets with high concentration of the target audience and targeted ethnic sub-segments with focus on consumers who are likely experiencing a qualifying life event.

Covered California is an independent part of the state government whose job is to make the health insurance marketplace work for Californians. It is overseen by a five-member board appointed by the governor and the Legislature. For additional information on Covered California, please refer to the consumer website at: www.CoveredCA.com.

1.3 Purpose

The purpose of this Request for Proposal (RFP) 2023-03 is for Covered California to solicit proposals from qualified firms to evaluate Covered California's historical media spend and current media spend to determine if investment level is sufficient to achieve marketing goals, as well as analyze Covered California's current media mix by channel, by segment, and by designated market area (DMA) to determine if we are maximizing our return on investment (ROI). Based on these findings and industry benchmarks, the selected Proposer will formulate a budget recommendation designed to meet marketing objectives efficiently and effectively with suggested metrics to collect for measuring performance.

1.4 Key Action Dates

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

KEY ACTION DATES

Request for Proposal Release Date:	September 26, 2023
RFP Questions Due Date and Time:	October 10, 2023 by 3:00 PM
Proposers' Conference (virtual):	October 24, 2023 at 1:00 PM
Responses to Questions Posted By:	October 26, 2023
Proposal Due Date and Time:	November 7, 2023 by 3:00 PM
Virtual Presentations:	December 1- 4, 2023, 2023
Notice of Intent to Award:	Week of December 12, 2023
Anticipated Contract Term:	December 15, 2023 to December 14, 2024

1.5 Contact

For questions regarding this RFP, contact Covered California via email at HBEXSolicitation@covered.ca.gov with "RFP 2023-03" in the subject line. The Covered California contact for this solicitation is Joyce Anne Asper.

Please reference the RFP number in all communications. Phone calls will not be accepted.

1.6 Contract Term

The initial term of the contract shall be for one (1) year, from December 15, 2023 to December 14, 2024; however, the contract term is subject to change and may be amended. The resulting contract will be of no force or effect until signed by both parties. Performance shall not commence until a valid contract has been executed between the successful Proposer and Covered California. Covered California will not pay for any services performed prior to the execution of a valid contract.

1.7 Contract Amount

Proposal submissions shall not exceed \$500,000.00 in total proposed costs. Proposals that exceed this amount will not be considered for selection.

Funding is subject to annual budget approval by the Covered California Board of Directors. If full funding does not become available, Covered California may terminate or amend the contract to reflect reduced funding and reduced deliverables.

1.8 Contract Amendment

Covered California may, at its sole discretion, extend the term of the contract for up to one (1) additional one-year term. The total number of contract years shall not exceed two (2) years. Total funding for this contract shall not exceed \$1,000,000.00 including optional one-year extension.

The parties may increase or decrease funding through an amendment but cannot exceed the annual amount and rates set by Contractor's proposal. Funding for optional one-year extension year may not be used in advance and may not exceed the funding amount set in the initial contract term unless authorized by the solicitation.

Any amendment will require Covered California's approval in accordance with its policies and procedures. An amendment may require a formal resolution from the Covered California Board of Directors before Covered California can execute it.

1.9 Proposers' Conference and Registration

Covered California will conduct a voluntary Proposers' Conference on October 24, 2023 from 1:00 PM PT to 3:00 PM PT via webinar.

Prospective Proposers are strongly encouraged to participate but are not required to do so. The purpose of the conference is for Covered California to provide an overview of itself, discuss the RFP process, and give prospective Proposers an opportunity to ask questions about proposal preparation and submission before the due date. To register for attendance at the Proposers' Conference, send a request to the email address provided in Section 1.5 by 3:00 PM PT on October 23, 2023. The prospective Proposer's organization name, name(s) of those attending, and contact information must be clearly identified. Webinar attendance information will be provided upon registration.

Questions from Proposers sent in advance will be answered at the Proposers' Conference and must be submitted via email to the address provided in Section 1.5 by 3:00 PM on October 23, 2023.

Remarks and explanations expressed during the Proposers' Conference shall 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 website listed in Section 1.10 below.

1.10 RFP Questions

Prospective Proposers must submit questions regarding this RFP by the due date and time specified in the Key Action Dates table in Section 1.4. Only questions sent to the email address provided in Section 1.5 will be accepted. Prospective Proposers must provide enough specific information to enable Covered California to identify and

respond to their questions. When submitting questions, please reference the RFP number, 2023-03, in the subject line.

Responses to questions received during the RFP Questions time period will be posted on the website at <http://hbex.coveredca.com/solicitations>. Proposers who fail to report a known or suspected problem with this RFP or who fail to seek clarification or correction of this RFP do so at their own risk.

In its sole discretion, Covered California may contact a prospective Proposer to seek clarification or additional information regarding any question received.

1.11 Submission of Proposals

1. **Proposers' Cost:** Costs for developing proposals are entirely and solely the responsibility of the Proposer and are not chargeable to Covered California.
2. **Completion of Proposals:** Proposers are required to be both responsive (fully compliant) and responsible (capable and qualified to perform work) relative to the solicitation requirements. Proposals must be complete in all respects and contain all required items as described in the requirements established within this RFP, its attachments, and any written responses to questions or amendments posted by Covered California on its website. A proposal may be rejected by Covered California, in its sole discretion, if the proposal is conditional, incomplete, or irregular in any way. A proposal must be rejected by Covered California if any defect or irregularity constitutes a material deviation from the RFP requirements as determined by Covered California, in its sole discretion.
3. **False or Misleading Statements:** Proposals which contain false or misleading statements, or which provide references that do not support an attribute or condition claimed by the Proposer may be rejected. If, in the sole opinion of Covered California, such information was intended to mislead Covered California in its evaluation of the proposal or was included as a result of gross negligence attributable to the Proposer, and the attribute, condition, or capability is a requirement of this RFP, it shall be grounds for rejection of the proposal.
4. **Errors:** If a Proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP, the Proposer shall immediately notify Covered California of such error by emailing the contact in Section 1.5 and shall request a modification or clarification of the RFP. Modifications or clarifications will be given by written notice posted on the website at <http://hbex.coveredca.com/solicitations> without divulging the source of the request for modification or clarification. Covered California shall not be responsible for a Proposer's failure to correct errors, nor for any Proposer's failure to regularly and timely check the website for changes.
5. **Importance of Meeting Deadlines:** Proposers are responsible and assume all risks for the delivery and receipt by Covered California of all proposal submissions prior to the submission deadline. The stated deadlines for submitting a proposal and all

required materials for receipt by Covered California will be strictly enforced. Submissions that are incomplete or received after the stated deadline may not be accepted.

6. **Assessment of Proposals:** All proposals will be assessed based on the evaluation criteria as set forth in this RFP and at Covered California's sole discretion. The selection and contract award, if made, will be made to a single Proposer unless otherwise specified in this RFP. The Scope of Work (SOW) and the selected Proposer's proposal, including proposed cost, will be incorporated by reference into the resulting contract.

1.12 Format of Proposals

Proposers must submit a proposal package that contains all required attachments, documents, narrative responses, and Model Contract exhibits. Proposals must be submitted electronically via email to HBEXSolicitation@covered.ca.gov with "RFP 2023-03" in the subject line. Hard copy proposals will not be accepted and will be deemed non-responsive.

1. Electronic Signatures

Proposers may sign required attachments and documents electronically or with ink, so long as the attachments and documents are submitted in PDF format. Signatures must be provided by an authorized signatory who is authorized to contractually bind the Proposer organization.

2. Narrative Format

- a. Narrative portions of proposals should be prepared to provide a straightforward, concise delineation of the Proposer's capabilities to satisfy the requirements of this RFP. Emphasis should be on conformance with the RFP instructions, responsiveness to the RFP requirements, and completeness and clarity of content. Expensive bindings, colored displays, promotional materials, etc., are not necessary nor desired.
- b. Proposers must follow the format requirements listed below for all narrative portions of the proposal submission. Failure to do so may result in an entire proposal or affected section not being read or evaluated, at Covered California's sole discretion.
 - 1) Use a Times New Roman, Arial, or Calibri font of at least 12-point size throughout unless a form is required by Covered California that contains a smaller font.
 - 2) Use one-inch margins at the top, bottom, and sides.

- 3) 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 reviewed or scored. It is not necessary to paginate the required forms.
- 4) Place the Proposer organization's name in a header or footer on every page. If the Proposer's name is not already entered elsewhere on a completed certification or form, add it to a header, footer, or signature block.

3. Model Contract with Exhibits

All proposals must be based on and conform to the Model Contract provided with this solicitation. Proposers should review the Model Contract in its entirety prior to submitting a proposal. Proposers must submit as part of their proposals any changes or exceptions to the Model Contract that they wish to negotiate. However, extensive or significant changes or exceptions to the Model Contract may make the proposal non-responsive to the RFP if Covered California, in its sole discretion, determines that the proposed changes or exceptions materially change the contractual relationship between the parties. Proposer-suggested changes or exceptions to the Model Contract exhibits must be documented via tracked changes to the documents using Microsoft® Word®. All Model Contract changes or exceptions must be included in the proposal package at the time of submission. No additional changes or exceptions may be presented during contract negotiations. Covered California reserves the right to reject all changes and exceptions in the proposal package.

1.13 Covered California's Rights

1. Verification of Proposer Information

By submitting a proposal, the Proposer authorizes Covered California to do the following:

- i. Verify any and all claims made by the Proposer, including, but not limited to, verification of prior experience and possession of all other required qualifications; and
 - ii. Check any and all references identified by the Proposer, or any other resource known or identified by Covered California, to confirm the Proposer's business integrity and history of providing effective, efficient, competent, and timely goods and/or services.
2. Covered California may, in its sole discretion, modify the RFP prior to the proposal submission deadline by the issuance of an addendum on the website listed at <http://hbex.coveredca.com/solicitations>.

3. Covered California reserves the right to reject any proposal that does not satisfy the requirements set forth in this RFP. Before submitting a response to this RFP, prospective Proposers should review and correct all errors and confirm compliance with all RFP requirements.

1.14 Rejection of Proposals

Deviations may cause a proposal to be deemed non-responsive and to not be considered for award. Covered California may reject any or all proposals and/or may waive any immaterial deviation or defect in a proposal. Covered California's waiver of any immaterial deviation or defect shall in no way modify the RFP documents or requirements and shall not excuse the Proposer from full compliance with the RFP specifications if awarded the contract.

Proposals that are not received by the date and time specified in Section 1.4 Key Action Dates will be maintained separately from proposals that have been timely received. Proposals received after the due date may only be considered upon written approval of Covered California's Executive Director or his/her designee specifying the reason(s) for acceptance and consideration of the untimely proposal.

Issuance of this RFP in no way constitutes a commitment by Covered California to award a contract. Covered California reserves the right to do the following:

- i. Reject any or all proposals received in response to this RFP, or portions of proposals;
- ii. Amend or cancel this RFP at any time, after which Covered California may reissue the RFP at a later date; and
- iii. Consider a Proposer's past contract performance with Covered California in its selection of a Proposer pursuant to this RFP.

1. Non-Responsive Proposals

A proposal may be deemed non-responsive and subsequently rejected if any of the following occur:

- i. The proposal is received after the exact time and date set forth in Section 1.4 Key Action Dates for receipt of submissions;
- ii. The Proposer fails to meet one or more of the minimum qualifications specified in the Proposer's Minimum Qualifications Certification (Attachment 8);
- iii. The Proposer fails to submit or fails to complete and sign any required attachments as instructed in this RFP;
- iv. The proposal contains false, inaccurate, or misleading statements or references;
- v. The Proposer is unwilling or unable to fully comply with Covered California's proposed contract provisions; or

- vi. The Proposer supplies conditional cost information, incomplete cost information, or cost information containing unsigned/uninitiated alterations or irregularities.

2. Business in Good Standing

Proposer acknowledges that when agreements are to be performed in the State of California by corporations or vendors, Covered California will verify, prior to awarding any State contract, the following information in order to ensure that all obligations due to the State are fulfilled:

a. Corporation in Good Standing

As required by California law, Proposer organizations must be in good standing and qualified to do business in California at the time of submitting a proposal and, if selected by Covered California, during the entire term of the contract. If the Proposer organization is incorporated, the Proposer's status with the California Secretary of State (SOS) must be Active; a status of Cancelled or Suspended will cause the Proposer to be deemed non-responsive. This requirement does not apply to sole proprietors and general partnerships. Unless otherwise specified, the Proposer shall not submit copies of its organization's bylaws or Articles of Incorporation.

"Doing business" is defined in California Revenue and Taxation Code section 23101 as actively engaging in any transaction for the purpose of financial or pecuniary gain or profit. Although there are some statutory exceptions to taxation, rarely will a corporate contractor performing within the State not be subject to the franchise tax.

Both domestic and foreign (those incorporated outside of California) corporations must be in good standing in order to be qualified to do business in California.

b. State Tax Delinquency

Covered California will verify with the California Franchise Tax Board (FTB) and California Department of Tax and Fee Administration (CDTFA) that the Proposer is not on a prohibited list due to tax delinquencies. The proposal will be considered non-responsive if the Proposer is on any of these lists.

The list established by FTB can be found at:

<https://www.ftb.ca.gov/about-ftb/newsroom/top-500-past-due-balances/corporate-income-tax-list.html>.

The list established by CDTFA can be found at:

<https://www.cdtfa.ca.gov/taxes-and-fees/top500.htm>.

3. Executive Order N-6-22 – Russia Sanctions

On March 4, 2022, Governor Gavin Newsom issued Executive Order [N-6-22](#) (the EO) regarding Economic Sanctions against Russia and Russian entities and individuals. “Economic Sanctions” refers to sanctions imposed by the U.S. government in response to Russia’s actions in Ukraine, as well as any sanctions imposed under state law. By submitting a bid or proposal, Contractor represents that it is not a target of Economic Sanctions. Should Covered California determine Contractor is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for rejection of the Contractor’s bid/proposal any time prior to contract execution, or, if determined after contract execution, shall be grounds for termination by Covered California.

1.15 Errors in Proposals

An error in a proposal may cause the rejection of that proposal; however, Covered California may, in its sole discretion, retain the proposal and make certain corrections. In determining if a correction will be made, Covered California will consider the conformance of the proposal to the format and content required by this RFP and any unusual complexity of the format and content required by this RFP.

1. If the Proposer's intent, as determined by Covered California, is clearly established based on its review of the complete proposal submission, Covered California may, in its sole discretion, correct an error based on that established intent.
2. Covered California may, in its sole discretion, correct obvious clerical errors.
3. A Proposer may modify a proposal after submission by withdrawing its original proposal and resubmitting a new one as long as it is received prior to the proposal submission deadline. Modifications offered by a Proposer in any other manner, oral or written, will not be considered.
4. A Proposer may withdraw its proposal by submitting a written withdrawal request to Covered California, signed by the Proposer or an authorized agent. Proposals may not be withdrawn subsequent to the proposal submission deadline without cause.
5. No oral understanding or contract shall be binding on either party.

Covered California reserves the right to contact any Proposer at any stage of the solicitation process to collect additional clarifying information, if deemed necessary and appropriate by Covered California.

1.16 Protest

Any protest properly submitted within five (5) business days of the posting of the Notice of Intent to Award will be considered. All protests will be reviewed and decided by the Executive Director or his/her designee. The following protest procedures shall be followed:

1. General

An unsuccessful Proposer may protest the intended award to another Proposer by following the terms and conditions outlined below. The protester challenging Covered California's intended award bears the burden of proof.

2. Grounds

Protester must cite the specific grounds for the protest and provide all facts and citations of law sufficient to support the protest and enable the Executive Director or his/her designee to make an informed, proper decision. Covered California will determine, in its sole discretion, if the protester has demonstrated sufficient grounds to allow the protest to be heard. Abuse of the protest process by unsuccessful Proposers for the purpose of securing confidential information about other Proposers will be rejected by Covered California. The sole grounds for a protest are:

- i. Protester reasonably believes that Covered California has acted in an arbitrary and capricious manner; and/or
- ii. Protester reasonably believes that Covered California committed an error in the proposal process as stated in the solicitation that is sufficiently material to justify invalidation of the intended award.

There shall be no basis for protest if Covered California rejects all proposals.

3. Requirements for Protest

Protests must be submitted in writing, signed by an individual who is authorized to contractually bind the Proposer, and include all grounds and supporting facts and evidence upon which the protest is based, as well as all citations of law, rule, regulation or procedure upon which the protester relies. Protests must be received by Covered California no later than the close of business five (5) business days after the Notice of Intent to Award has been posted.

Protests must be emailed to HBEXSolicitation@covered.ca.gov with "PROTEST FOR RFP 2023-03".

The Executive Director's or his/her designee's decision shall be final.

4. Terms of Protest

Scoring documents, evaluation and selection documents, other Proposers' submissions, or any other record created during the review of proposals submitted in response to this RFP are not public records and are exempt from disclosure as public records pursuant to Government Code section 100508(a).

A protester who has demonstrated a legitimate ground for protest as described above may be provided limited access to certain relevant, non-public information regarding the RFP and Covered California's consideration of submissions in response to the RFP upon the protester's execution of a Non-Disclosure Agreement provided by Covered California and the approval of Covered California's General Counsel or his/her designee. Trade secret, proprietary, and confidential information will be redacted from any documents disclosed to protester as part of the protest process.

1.17 Disposition of Proposals

Upon proposal opening, all documents submitted in response to this RFP become the property of the State of California.

1.18 Contract Execution and Performance

Performance shall begin no later than the date set forth in this RFP by Covered California and after the contract is fully executed, unless a later date is mutually agreed upon by Covered California and the Contractor. Notwithstanding any other provision, should the Contractor fail to commence work on the agreed date and time, Covered California reserves the right to terminate the contract upon five (5) business days written notice to the Contractor. In such an event, the Contractor shall be liable to Covered California for the difference between the Contractor's cost proposal and, if greater, the actual cost of performing the work by a replacement contractor.

All performance under the contract shall be completed before the termination date of the contract unless an earlier date is specified in the contract.

1.19 Subsequent Solicitation

If at any time during the negotiation of a contract with the successful Proposer, Covered California determines it is not able to reach an agreement with the successful Proposer, Covered California may, in its sole discretion, terminate the negotiations and engage the next highest-scored Proposer without performing a subsequent solicitation.

1.20 Addition or Subtraction of Services

Notwithstanding that proposals have been submitted, at Covered California's sole discretion, the SOW may be modified prior to contract award to add or remove services

through an addendum. If the date and time for submission of proposals has passed as of the time the addendum is posted and proposals have been received, Covered California, in its sole discretion, may restrict responses to the modified SOW so that only entities that submitted timely proposals in response to the initial RFP may respond to the addendum.

1.21 News Releases and Social Media

By submitting a proposal, Proposers and the selected Contractor agree that they will not issue news releases nor make statements to the news media or through social media channels pertaining to this RFP, their proposals, the contract, or work resulting therefrom, without first obtaining prior approval from Covered California.

2. PROJECT TEAM

Covered California seeks a team with experience and knowledge of the process outlined in this RFP and the Model Contract Exhibit A – Scope of Work. Proposers must demonstrate that the project team members who will be assigned to the project possess the experience, education, knowledge, and skills required to perform the work described in this RFP.

2.1 Project Team Minimum Qualifications

All required minimum qualifications are outlined in Attachment 8 – Proposer Minimum Qualifications Certification. Please carefully review Attachment 8 to ensure that your organization meets the relevant minimum requirements before submitting a proposal. Failure to meet any minimum qualification will result in disqualification.

2.2 Project Team Desirable Qualifications

Covered California seeks a team of highly qualified senior staff to provide support services as required by the Model Contract. Please carefully review Model Contract Exhibit A – Scope of Work for any requirements related to the project team and staffing.

2.3 Reassignment of Personnel

1. The personnel specifically identified in Exhibit C, Attachment 1 – Resumes, are considered essential to the work being performed under this Agreement. The Contractor shall not reassign nor substitute personnel assigned to the contract during the contract term 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. Covered California reserves the right to require a Contractor employee to be removed from performing any work on the contract and on written notice to the Contractor, the Contractor shall assign an acceptable substitute employee.
3. 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, on the experience and individual skills of the proposed substitute personnel; however, the negotiated rate shall not exceed the hourly rate stated in the contract.

3. SCOPE OF WORK

See Model Contract Exhibit A – Scope of Work for a detailed description of the services and work to be performed as a result of this procurement.

3.1 Contract Completion Criteria

The contract resulting from this RFP will be considered complete when Covered California has approved and accepted all assigned contract deliverables.

3.2 Project Assumptions and Constraints

1. The Contractor's work hours shall be consistent with Covered California's key staff, whose normal business hours are 8:00 AM to 5:00 PM, Monday through Friday, except for State holidays.
2. Overtime rates will not be reimbursed under the contract.
3. Pre-approved travel expenses will be reimbursed as outlined in Model Contract Exhibit E – Travel Reimbursement.
4. Any modifications to tasks within Model Contract Exhibit A – Scope of Work of the contract shall be defined, documented, and mutually agreed upon by the Contractor and Covered California's representative prior to starting work on the modified task(s). Covered California's representative may refine or clarify the services deemed necessary to meet the needs of this project in accordance with Covered California's priorities.
5. Covered California and the Contractor shall be mutually obligated to keep open and regular channels of communication in order to ensure the successful performance of the contract. Both parties shall be responsible for communicating potential problems or issues to Covered California's Representative and the Contractor's project team manager, respectively, within forty-eight (48) hours of becoming aware of the problem or issue.

3.3 Payment and Invoicing

If the collection of fees assessed from Qualified Health Plans are collectively not sufficient to provide the funds for this contract, Covered California shall have the option to either cancel this contract with no liability occurring to Covered California or offer a contract amendment to the Contractor to reflect the reduced amount.

The Contractor may invoice Covered California only after the successful completion and acceptance of the contract deliverables. The Contractor may not invoice Covered California for any costs exceeding the maximum amount identified to complete a deliverable.

4. REQUIRED PROPOSAL SUBMISSION CONTENT

Proposal submissions must include content for the following categories, which are described in detail in the sections below.

- Administrative Requirements
 - Required attachments
 - Required documents
 - Updated Model Contract with Exhibits
- Technical Requirements
 - Understanding and Approach
 - Corporate Qualifications Summary
 - Project Team Qualifications
 - Resumes
 - Past Projects Completed
 - Project Assumptions
- Cost Proposal
- Virtual Presentation

4.1 Proprietary Information and Confidential Status of Responses

Any documentation submitted which has been marked “Proprietary” or “Trade Secrets” may be rejected. All proposals and evaluation documents are confidential and will not be available for public inspection pursuant to Government Code Section 100508(a)(1).

4.2 Administrative Requirements

To be deemed responsive, Proposers must comply with the Administrative Requirements in this section. The Administrative Requirements will be assessed on a pass/fail basis to verify compliance with all Administrative Requirements.

4.2.1 Required Attachments

Proposals must include the following required attachments as set forth below. Any attachment that requires a signature must be signed by a representative authorized to contractually bind the Proposer organization. Photocopies of wet signatures and electronic signatures are acceptable.

- i. The *Proposal Cover Page* form (Attachment 1) completed and signed;
- ii. The *Payee Data Record (STD. 204)* form (Attachment 2) completed and signed;
- iii. The *Contractor Certification Form* (Attachment 3) completed and signed;
- iv. The *Statement of Economic Interests Certification* form (Attachment 4) completed and signed;
- v. The *Bidder Declaration (GSPD-05-105)* form (Attachment 5) completed and signed; and
- vi. The *Proposal Checklist* form (Attachment 6) completed.
- vii. The *Client References* (Attachment 7) completed; and
- viii. The *Proposer's Minimum Qualifications Certification* form (Attachment 8) completed and signed.

Attachment 4 is a Proposer certification form whereby the Proposer acknowledges and agrees that, upon contract execution, the Proposer's representative and applicable staff, if identified as code filers, agree to provide a completed Statement of Economic Interests (Form 700). For more information, see the Covered California Conflict of Interest Code at <http://hbex.coveredca.com/resources> and the Fair Political Practices Commission website at <http://www.fppc.ca.gov/Form700.html>.

If the Proposer wishes to claim the TACPA preference (see Section 6, Preference and Incentive Programs), the following optional attachments must also be included, as applicable:

- i. The *Target Area Contract Preference Act Preference Request for Goods and Services Solicitations (STD. 830)* form (Attachment 9) completed and signed.
- ii. The *Bidder's Summary of Contract Activities and Labor Hours (DGS/PD 526)* form (Attachment 10) completed and signed.

4.2.2 Required Documents

Proposals must include the following required insurance documents:

- i. A Certificate of Liability Insurance equal to or greater than \$1,000,000;
- ii. Proof of Workers' Compensation Liability Insurance; and
- iii. Proof of Automobile Liability Insurance, including non-owned auto liability, of \$1,000,000 per occurrence for persons used by the Contractor for services provided pursuant to this contract.

If the Proposer cannot include a Certificate of Liability Insurance and/or a Certificate of Automobile Liability Insurance with its proposal, it must provide a written explanation detailing why it cannot comply with the requirement(s). Covered California may, in its sole discretion, accept a proposal without these Certificates if the Proposer provides a valid justification for the absence of one or both of them and confirms that it will submit the appropriate Certificate(s) prior to contract execution, if it is selected as the Contractor. Covered California cannot execute a contract with the selected Contractor without both of these required Certificates and will award the contract to the next highest-scored Proposer if the Contractor fails to produce the Certificate(s) prior to contract execution.

If the Proposer organization is incorporated, proof of Active status with the California Secretary of State (SOS) must be provided in one of the following forms:

- i. A copy of the Proposer's current Certificate of Status issued by the SOS; or
- ii. A copy of the Proposer's Entity Detail page from the SOS's Business Search website (<https://businesssearch.sos.ca.gov/>).

4.2.3 Updated Model Contract with Exhibits

Proposers must make any suggested changes to the Model Contract as instructed below.

1. Using the Model Contract Exhibit A – Scope of Work provided, include a revised Exhibit A – Scope of Work with suggested tracked changes in Microsoft® Word®.
2. Using the Model Contract Exhibit B – Budget Detail and Payment Provisions and Exhibit B, Attachment 1 – Cost Proposal provided, include a revised Exhibit B – Budget Detail and Payment Provisions with suggested tracked changes in Microsoft® Word®.
3. Using the Model Contract Exhibit C – General Terms and Conditions and Exhibit C, Attachment 1 – Resumes provided, include a revised Exhibit C – General Terms and Conditions with suggested tracked changes in Microsoft® Word®.

See Section 1.12, Item 3 – Model Contract with Exhibits for additional information. Submission of Model Contract exhibits without suggested tracked changes will constitute acceptance by the Proposer of the exhibits as drafted.

4.3 Technical Requirements

To be deemed responsive and responsible, Proposers must comply with the Technical Requirements in this section.

4.3.1 Understanding and Approach

Proposers must provide a narrative description of their understanding of the project's goals, emphasizing their understanding of the objectives and the major activities that must be performed to complete the work. Proposers should discuss their strategy for providing the services outlined in the Exhibit A – Scope of Work within the contract period. Proposer should provide their plan and methodology for evaluating historical media spend; assessing current media spend level and channel mix; determining ROI; and how Proposer plans to determine if Covered California's investments in media are too large, too little, or have an appropriate funding level to achieve our objectives. Proposers should also include their plan for using subcontractors or outside entities, if any, to augment their team to complete the tasks in the Scope of Work.

Additionally, Proposers must provide a Work Plan that outlines their understanding of the SOW and describes the tasks they intend to perform and includes a timeline for completion.

(No more than fifteen (15) pages.)

4.3.2 Corporate Qualifications Summary

Covered California seeks a Proposer with significant corporate capacity to respond to Covered California's needs for the duration of the contract, to support a high degree of qualified staff continuity, and to maintain a consistently high level of individual team member performance.

Proposers must narratively describe their overall capability and available resources and provide specific examples, as these factors relate to the general requirements set forth in Model Contract Exhibit A – Scope of Work, including the following:

- i. Experience tracking and analyzing performance and ROI of large-scale multi-channel paid media campaigns, including off-line channels like Television and Radio, to achieve marketing objectives.
- ii. Ability to manage the project and address any contingencies;
- iii. Ability to provide quality deliverables; and
- iv. Evidence of experience performing the services outlined in the Exhibit A – Scope of Work, including the total number of years the Proposer has been providing these services.

(No more than ten (10) pages.)

4.3.3 Project Team Qualifications

Please carefully review Model Contract Exhibit A – Scope of Work to ensure the proposed project team have the capacity and experience to fulfill the needs of the SOW.

Proposers must narratively describe the qualifications of each member of the proposed project team and identify the role each member is expected to have, including the experience, education, knowledge, and skills each possesses as they relate to their proposed role. In addition, Proposers must identify the key staff that will be the points of contact for Covered California and indicate the percentage of time that staff will be dedicated to the work detailed in Model Contract Exhibit A – Scope of Work.

(No more than five (5) pages.)

4.3.3.1 Resumes

Proposers must provide a resume of the relevant experience held by each proposed project team member. For each experience cited on a resume, the information must include the following:

- i. The total duration (i.e., the start month and year, the end month and year, and the total number of years and months); and
- ii. A description of specific experience (i.e., a complete description of the relevant experience, including identification of the client, name of the project, roles and responsibilities of the individual, and types of services provided by the individual).

When preparing resumes for submission, Proposers should only include the individual work experiences that are most relevant to this RFP. Work experiences that are not relevant to this RFP will not be considered by Covered California in determining whether the Proposer is responsible.

(No more than two (2) pages per project team member.)

4.3.4 Past Projects Completed

Proposers must narratively describe up to three (3) projects they have completed in the past three (3) years that relate to the tasks listed in Model Contract Exhibit A – Scope of Work.

(No more than ten (10) pages.)

4.3.5 Project Assumptions

Proposers must document any assumptions they are making about the SOW, the responsibilities of the Contractor and Covered California, and any other issues relevant

to proposal submission in response to this RFP and the ability to do the work for the proposed cost.

(No more than two (2) pages.)

4.3.6 Client References

Proposers must submit one (1) detailed Attachment 7, Client References and must list three clients served in the past three years for which Proposer provided services similar to those listed in in the Model Contract Exhibit A - Scope of Work.

4.3.7 Cost Proposal

Proposers must state the total dollar amount of their cost proposal for the entire initial one (1) year contract where indicated on the Proposal Cover Page (Attachment 1). By signing Attachment 1, the Proposer organization certifies the dollar amount of the total cost proposal, which shall be binding for each one-year term of the contract.

5. EVALUATION AND SELECTION FOR CONTRACT AWARD

Covered California will review and score each proposal submission in three (3) phases according to the procedures and criteria set forth below in this section.

During the evaluation and selection process, Covered California will determine which Proposers, if any, are qualified to receive the *Target Area Contract Preference Act (TACPA)* Proposer preferences and adjust their proposal scores accordingly for ranking purposes only (see Section 6, Preference and Incentive Programs).

5.1 Phase One: Administrative Requirements

Covered California will review the administrative content of each proposal and assess it as either pass or fail in terms of being fully compliant. Proposal submissions must include all required administrative content to earn a passing assessment; those that do not will be deemed non-responsive and will not be evaluated further.

5.2 Phase Two: Technical Requirements

The Covered California Evaluation Team will conduct a qualitative review of the technical content of each responsive proposal to determine how capable and qualified to perform work each Proposer is by scoring the categories of Understanding and Approach, Corporate Qualifications Summary, Project Team Qualifications, and Past Projects Completed. Project Assumptions will not be scored.

Next, the cost proposal score for each responsive proposal will be calculated and added to the total score.

5.3 Phase Three: Virtual Presentation

After the proposals have been scored on each of the aforementioned categories, virtual presentations will be conducted with the Proposers with the highest scores. The number of Proposers asked to give a virtual presentation is within the sole discretion of Covered California. Proposers who do not score high enough to qualify for a virtual presentation will not be considered for the contract award. Proposers who move on to Phase Three will be contacted to schedule a time and date for the virtual presentation on dates specified in section 1.4 Key Action Dates. Proposer will also receive additional information about the presentation.

5.4 Phases Two and Three: Evaluation Categories and Criteria

For the purposes of this RFP, the evaluation team will be conducting a best value analysis to determine the proposal that provides the best overall value to Covered California and that is most likely to result in a contract that fulfills the needs outlined in the Model Contract Exhibit A – Scope of Work.

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 Proposer 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 Proposer the opportunity to provide the best value in specific areas identified by Covered California.

Covered California may indicate to, or discuss with, each Proposer 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.

Proposals containing evidence of extensive previous experience and success in similar complex projects that resembled the Exhibit A – Scope of Work will receive significant consideration in the evaluation and selection process. The table below shows the evaluation categories for each phase, along with their relative weights and point limits where applicable.

Technical Content Evaluation Categories	Weight	Points
Technical Narrative Content	57% total	570 total
Understanding and Approach	18%	180
Corporate Qualifications Summary	13%	130
Project Team Qualifications	13%	130
Past Projects Completed	13%	130
Cost Proposal	30% total	300 total
Proposer Virtual Presentation	13% total	130
Combined Total	100%	1000

The Evaluation Team will score the technical content of each responsive proposal using the evaluation and scoring criteria shown in the table below. These same criteria will be utilized to score the Proposers who give virtual presentations.

Technical Content Evaluation Criteria						
Qualitative Rating	Relation to Project Requirements	Strengths	Deficiencies	Weaknesses	Likelihood of Success	Scoring Range
Excellent	Superior attainment of all requirements	Numerous and significant in key areas	None	Minor, if any	Very High	81-100% of available points
Good	Expected to meet all requirements	Some and significant in key areas	None	Minor, but are far outweighed by strengths	High	61-80% of available points
Acceptable	Capable of meeting all requirements	Some in non-key areas	Minor	Minor, but are outweighed by strengths	Fair	41-60% of available points
Marginal	May not be capable of meeting all requirements	None, or some that are outweighed by weaknesses or deficiencies	Significant	Significant	Poor	21-40% of available points
Unacceptable	Not likely to meet all requirements	None, or some that are far outweighed by weaknesses or deficiencies	Needs major revision	Needs major revision	None	0-20% of available points

5.4.1 Understanding and Approach

Scoring of this factor will be based on the Evaluation Team's assessment of the Proposer's understanding of, and insight into, the challenges and issues faced by Covered California as depicted in Model Contract Exhibit A – Scope of Work, as well as the feasibility, efficiency, and expected effectiveness of the approaches planned by the Proposer to complete the activities in the SOW. Evaluators will assign scores based on the information contained in the Proposer's Understanding and Approach narrative and Work Plan described above in Section 4.3.1 The Evaluation Team will consider the following in descending order of importance:

- i. Quality of the Proposer's approach in addressing the scope of responsibilities and activities in Exhibit A – Scope of Work, and likelihood the approach will result in a clear, defensible recommendation on media spend levels;
- ii. Demonstrated understanding of the key characteristics of the project in general.
- iii. Ability of Proposer to complete the SOW objectives in a timely fashion.

5.4.2 Corporate Qualifications Summary

Scoring of this factor will be based on the Evaluation Team's assessment of the Proposer's corporate resources, capacity, and historical track record as they relate to the SOW. Evaluators will assign scores based on the Proposer's Corporate Qualifications Summary narrative described above in Section 4.3.2.

5.4.3 Project Team Qualifications

Scoring of this factor will be based on the Evaluation Team's assessment of the breadth, depth, and relevance of each proposed team member's experience and credentials. Evaluators will assign scores based on information contained in the Project Team Qualifications narrative and resumes described in Section 4.3.3. The Evaluation Team will consider the following in descending order of importance:

- i. Demonstrated capacity to successfully assume responsibility comparable to that proposed in the project approach;
- ii. Demonstrated capacity to perform at a high level in multiple areas of project management and implementation;
- iii. General breadth and extent of relevant experience, as indicated by the number of projects and duration of individual involvement in each;
- iv. Relevance of experience as indicated by the scope and subject matter of project experience; and
- v. Relevance of education, training, and certifications.

5.4.4 Past Projects Completed

Scoring of this factor will be based on the Evaluation Team's assessment of the breadth, depth, and relevance of the Proposer's past projects compared to the requirements detailed in Model Contract Exhibit A – Scope of Work, as well as corporate resources and capacity as indicated by the characteristics of projects previously completed. Evaluators will assign scores based on information contained in the Past Projects Completed narrative described in Section 4.3.4.

5.4.5 Cost Proposal

Covered California will calculate the cost proposal scores for each Proposer by dividing the dollar amount of the lowest cost proposal by the dollar amount of each cost proposal, then multiplying those quotients by the maximum number of cost proposal points available. The equation below demonstrates this calculation.

$$\frac{\text{Lowest cost proposal}}{\text{Proposer's cost proposal}} \times \text{Cost proposal points maximum} = \text{Cost proposal score}$$

Fractions of cost proposal points in the resultant score will be rounded up or down to the nearest whole number. See the example calculation below, which shows how many cost proposal points three hypothetical Proposers would receive with a maximum of 300 cost proposal points.

Proposer	Cost Proposal	Calculation	Cost Proposal Score
A	\$400,000	$\frac{300,000}{400,000} \times 300$	225
B	\$350,000	$\frac{300,000}{350,000} \times 300$	257
C	\$300,000	$\frac{300,000}{300,000} \times 300$	300

5.4.6 Proposer Virtual Presentation

After the Evaluation Team has scored each responsive proposal on the technical content categories above, the Proposers with the highest scores will move to the virtual presentation phase. Scoring of this factor will be based upon the Evaluation Team’s assessment of the Proposer’s ability to reiterate and explain the narrative technical contents of its proposal and further demonstrate comprehension of the Scope of Work, Covered California’s project timeline and goals, and how to accomplish those goals while providing optimal value.

6. PREFERENCE AND INCENTIVE PROGRAMS

Covered California will determine which Proposers, if any, are eligible to receive Proposer preferences.

6.1 Target Area Contract Preference Act

This RFP includes Target Area Contract Preference Act (TACPA) preferences. If the Proposer is eligible for the preference program and wishes to take advantage of it, the Proposer must complete the *Target Area Contract Preference Act Preference Request for Goods and Services Solicitations (STD. 830)* form (Attachment 9) and the *Bidder’s Summary of Contract Activities and Labor Hours (DGS/PD 526)* form (Attachment 10) and include them in the proposal submission. More information is available at [Request Target Area Contract Preference \(ca.gov\)](#).

6.2 Small Business (SB) and Disabled Veteran Business Enterprise (DVBE) Incentive

While SB and DVBE preference incentives will not be offered in this RFP, Covered California remains committed to contracting with SB and DVBE entities in other procurements.

7. ATTACHMENTS

The attachments listed below have been provided to potential Proposers by Covered California and are hereby incorporated into this RFP.

1. Required Attachments

Number	Name
1	Proposal Cover Page
2	Payee Data Record (STD. 204)
3	Contractor Certification Form
4	Statement of Economic Interests Certification
5	Bidder Declaration (GSPD-05-105)
6	Proposal Checklist
7	Client References
8	Proposer's Minimum Qualifications Certification

2. Optional Attachments

Number	Name
9	Target Area Contract Preference Act Preference Request for Goods and Services Solicitations (STD. 830)
10	Bidder's Summary of Contract Activities and Labor Hours (DGS/PD 526)

8. MODEL CONTRACT WITH EXHIBITS

The model contract and exhibits listed below have been provided to potential Proposers by Covered California and are hereby incorporated into this RFP.

1. Model Contract

A Standard Agreement (STD. 213) form will be the cover and signature page for the contract.

2. Exhibits

- i. Exhibit A – Scope of Work
- ii. Exhibit B – Budget Detail and Payment Provisions
- iii. Exhibit B, Attachment 1 – Cost Proposal

- iv. Exhibit C – General Terms and Conditions
- v. Exhibit C, Attachment 1 – Resumes
- vi. Exhibit D: Privacy Addendum
- vii. Exhibit E: Travel Reimbursement