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CALIFORNIA**



# 2024 Proposer's Conference

**Communications and Public Relations**

**Request for Proposals**

December 18, 2024



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# WELCOME TO COVERED CALIFORNIA

## Craig Tomiyoshi



# Welcome

## Organization Overview

Craig Tomiyoshi

## Partnership Overview

## Marketplace Background

## Communications and PR Division Overview

Kelly Donohue

## Looking Back

Jagdip Dhillon

## What's Ahead

## RFP Housekeeping

Wendy McAnelly

## Q & A

Team



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# COVERED CALIFORNIA'S **Mission**





# Covered California's Vision and Mission

## Vision

The vision of Covered California is to improve the health of all Californians by assuring their access to affordable, high-quality care.

## Mission

The mission of Covered California 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 Strategic Pillars

## **Affordable Choices**

We connect consumers to financial assistance and a choice of affordable providers that give them the best value

## **Quality Care**

We ensure consumers consistently receive accessible, equitable, high-quality care.

## **Organizational Excellence**

We foster a nimble culture of continuous improvement that empowers and motivates our team to deliver on our mission with high standards.

## **Reaching Californians**

We are unwavering in our pursuit to reach Californians and connect them to comprehensive and affordable coverage.

## **Catalyst for Change**

We pioneer new ideas and disseminate our learnings to drive improvement in health care in California and nationally.

## **Exceptional Service**

We provide the highest level of service and exceed our consumers' expectations.

## **Diversity, Equity and Inclusion**

We apply this lens in all our work to improve the health and experience of our consumers and to create and support a workforce reflective of our core values and the people we serve.



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# THE RIGHT Agency Partner





# The Right Agency Partner

## What we are looking for

A trusted thought partner and agency team that can help build on our past successes, drive enrollment and retention, and positively impact the health of all Californians. We are seeking support to:

- Effectively execute our core local, statewide and national communications campaigns, with a priority on Open Enrollment, in multiple languages
- Help evolve our earned media and communications practices to be more innovative, creative and effective to generate media and consumer awareness in an evolving media landscape
- Dive deeper into communities with the greatest number of uninsured, and the greatest needs
- Deliver on the short- and long-term communications goals and objectives outlined in the 2023-2026 strategic plan



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# COVERED CALIFORNIA'S Marketplace Background





# Marketplace Background

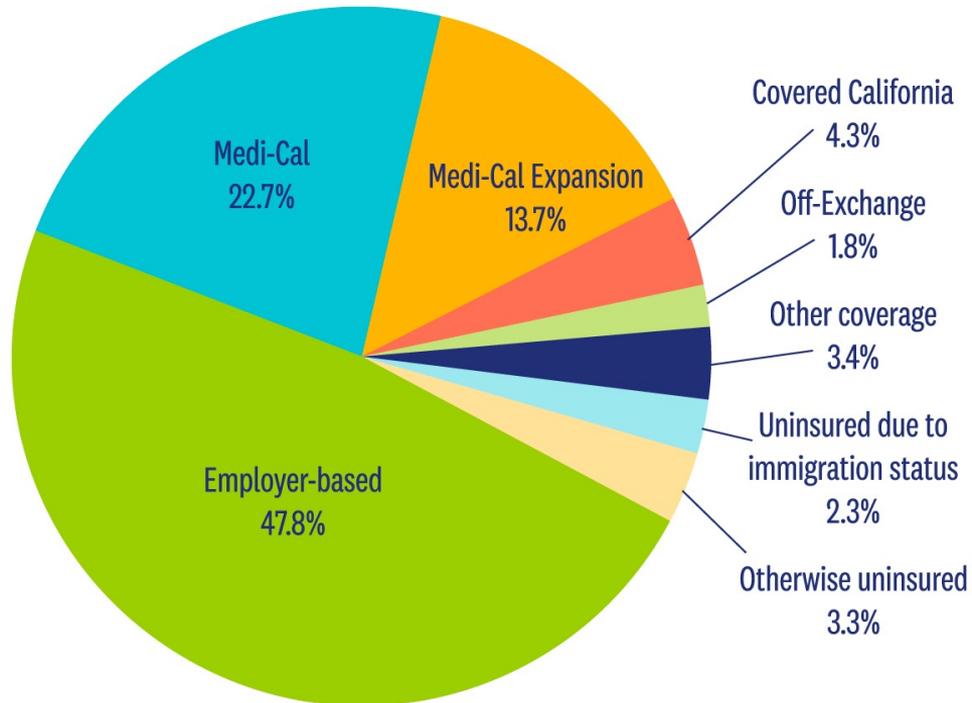
## Key Facts About Covered California

- Covered California = **Affordable Care Act in California**
- **Self-Funded Agency** – funded through a fee on insurance carriers
- **Active Purchaser** – Individual, Small Business, negotiate rates
- **Only place** that consumers and small businesses can get financial assistance to make insurance more affordable





# Health Insurance Market in California





# Individual Market Program

## Who's Eligible

Legally present Californians

DACA (as of Nov 1, 2024)

Individual mandate

## Financial Help

Federal tax credits

Cost-sharing reductions (CSR)

Based on income, family size, age and where you live

## Enrollment Help

Service Center

Agents

Community Based Enrollers

Storefronts

## Private Plans

Health plans

Dental plans

Vision plans

## Enrollment Periods

Open Enrollment  
Nov 1-Jan 31

Special Enrollment  
year-round

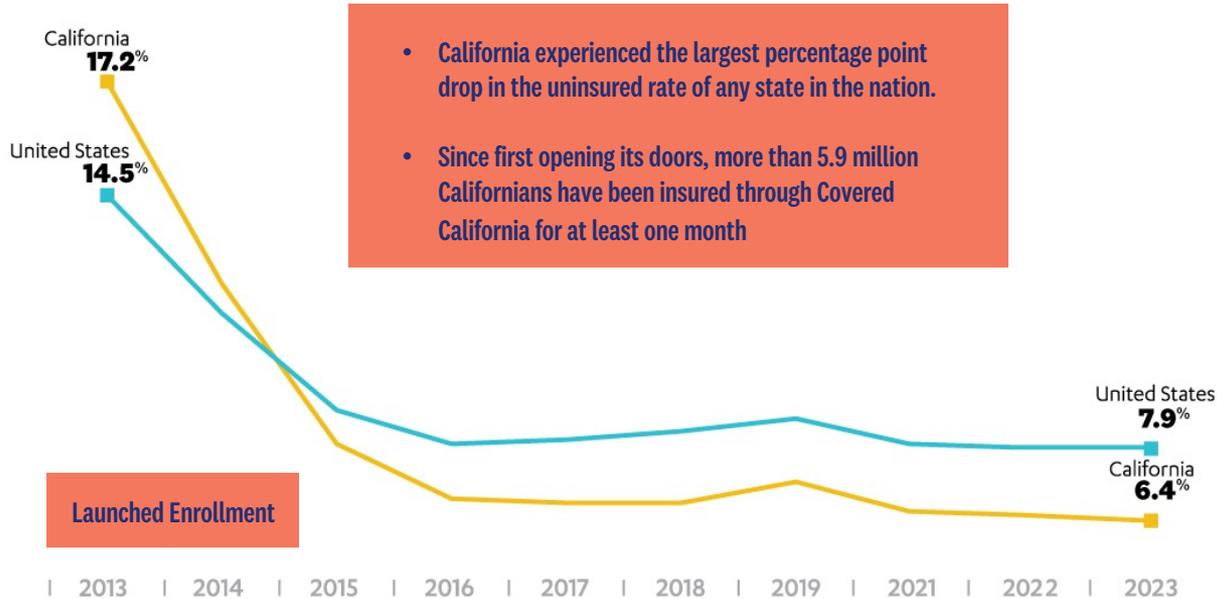


# Covered California Successes





# Record Decrease in Uninsured Rate



\*Source: American Community Survey, 2022 -American Community Survey Accuracy of the Data (2022) (census.gov). The rates for uninsured are shown for populations of all ages. The American Community Survey (ACS) is an annual demographics survey program conducted by the U.S. Census Bureau. U.S. Census data on California's uninsured rate in 2020 has been delayed due to the pandemic and is not reflected. The ACS data for the rate of uninsured is available through 2022.

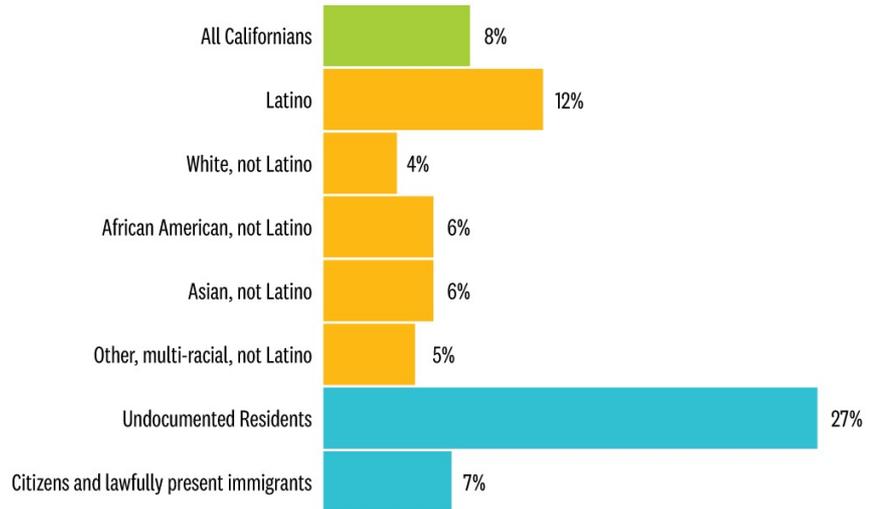


# Remaining Uninsured

Figure 1. Uninsured Californians age 0-64 by eligibility group, 2024



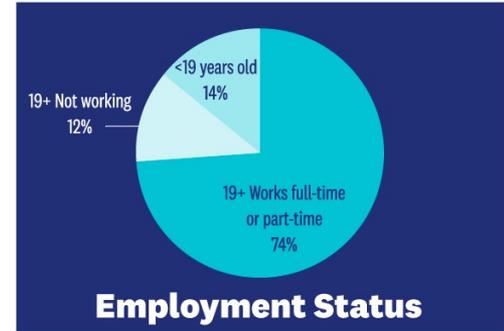
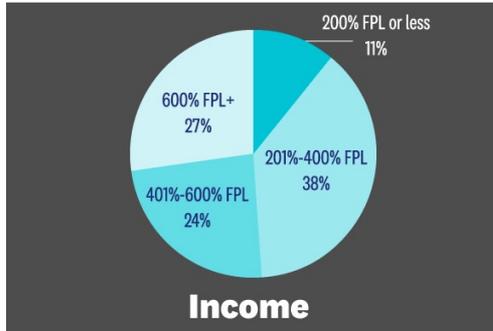
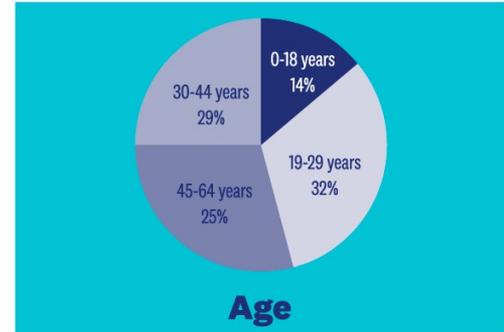
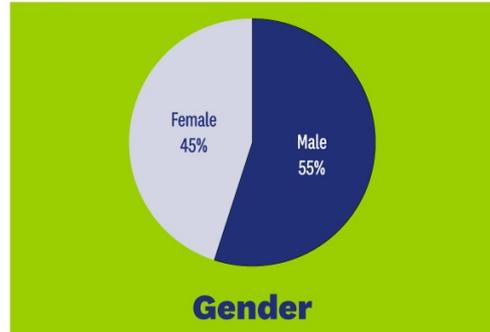
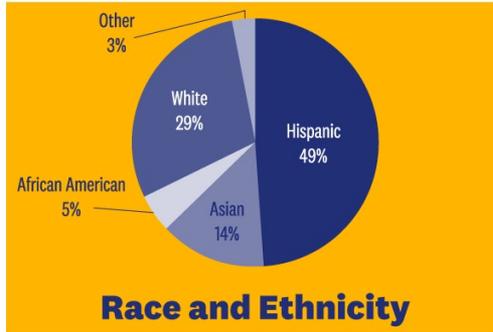
Figure 2. Uninsured Rate for all Californians age 0-64 by demographic group, 2024



\*Source: Source: UCB-UCLA CalSIM version 3.51



# Demographics of Uninsured





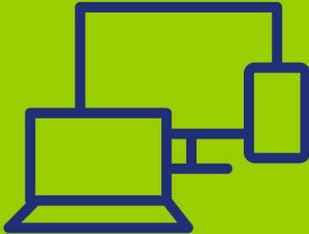
# Open Enrollment & Special Enrollment

	Open Enrollment	Special Enrollment
Enrollment Window	11/1 - 1/31	Year-round outside of OE Campaign
Geography	Statewide	Statewide
Target	CA 25-64 + HHI \$25K - \$150K Uninsured; Off-exchange; Medi-Cal transitioners; DACA recipients	CA 25-64 + HHI \$25K - \$150K + Qualifying Life Event
Segments	<b>Multi-Segment</b> (English) <b>LGBTQ+</b> (English) <b>Hispanic</b> (Spanish) <b>Asian</b> (Chinese - Mandarin, Cantonese, Korean, Vietnamese, Hmong, Laotian) <b>Black/African American</b> (English)	<b>Multi-Segment</b> (English) <b>Hispanic</b> (Spanish) <b>Asian</b> (Chinese - Mandarin, Cantonese, Korean, Vietnamese) <b>Black /African American</b> (English)



# How Consumers Can Apply

## Online



CoveredCA.com

## Phone



Service Center

## In-Person



Certified Insurance  
Agent  
Certified Enrollment  
Counselor



# CoveredCA.Com

The screenshot shows the CoveredCA.Com website interface. At the top, there is a navigation bar with the logo, menu items (Get Started, Health, Dental, Vision, Support), a search icon, and links for Sign In and Shop and Compare. The main content area features a blue background with a photo of a woman and a child. The headline reads "Special Enrollment Have a plan for all life's changes." Below this, a sub-headline says "Apply for a health plan outside open enrollment if you've experienced a qualifying life event." A form on the left allows users to input their Household Income (\$39,200), ZIP Code (95661), Household Size (3), How many need coverage? (1), and Age of People Needing Coverage (45). A "Calculate" button is at the bottom of the form. To the right, a "Quick Quote" section displays a green checkmark and a large "\$10 per month" price. Below this, it states "for a Silver plan. Bronze plans as low as \$0." and "After financial help from: Covered California". Two bullet points with checkmarks indicate: "Financial Help: \$583 per month" and "Bronze, Gold and Platinum plans also available". A "Continue" button is at the bottom of the quote section.

- Find out if you qualify for financial help or Medi-Cal
- Compare Plans
- Find enrollment help
- Create an Account and Enroll
- Mirrored Spanish website + landing pages in core Asian languages



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# COMMUNICATIONS & PUBLIC RELATIONS Division





# Communications and PR: Who We Are

The Communications and Public Relations Division administers an extensive program of communications and public relations activities and campaigns, provides video and graphic design services and support, and manages CoveredCA.com, the organization's consumer-facing website. Our 23-person division is organized into three departments:

 **Integrated Communications** – cross-department integration, graphic and visual design, and video

 **Media Relations** – earned media strategy and messaging

 **CoveredCA.com** – website strategy, UX and UI, and content



# Communications & PR: What We Do

**EARNED MEDIA**

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**CAMPAIGN DEVELOPMENT & INTEGRATION**

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**WRITTEN & VISUAL COMMUNICATIONS**

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**WEBSITE**

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**CRISIS COMMUNICATIONS**





# Strategic Priorities

## Open Enrollment Campaigns

Design and execute statewide campaigns to support Covered California's Open Enrollment, leveraging strategic integrated communications and earned media strategies and tactics. Campaigns are designed to reach consumers, stakeholders, and the media.

## External Announcements

Support key announcements and external communications priorities, including new programs, publications, research etc., through earned media and strategic messaging.





# Strategic Priorities

## Reaching California's Diverse Communities

Ensures Covered California is providing Californians with culturally and linguistically resonant content, geared toward communities with the greatest needs and barriers and designed to address awareness gaps.

## Dotcom Strategy and User Experience

Manages Covered California's consumer-facing website, CoveredCA.com, and oversees consumer UX and UI strategy and design.



SHOP

Policy Change

## DACA Recipients Now Eligible

A recent rule change means DACA recipients can apply for health insurance through Covered California starting Nov. 1. They can also get [financial help](#) if they qualify.

[Learn more](#) →

## How do I apply?

You have a few options when it comes to applying for health insurance. Apply online, in person or by phone —





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# LOOKING BACK AT OUR Campaigns





# A Look at the Past 12 Years

## AWARENESS & ENROLLMENT CAMPAIGNS

- Implementing and baking in the ACA
- State-wide bus tour
- “Ten Years Strong” Campaign
- “Bridging the Gap” Campaign
- Shifting the lens to focus on multi-cultural and target consumer outreach

# Let's Talk Health

## REACHING THE REMAINING UNINSURED

Covered California's "Let's Talk Health" initiative aimed to improve the health literacy of all Californians – especially the remaining uninsured – and engaging them in conversation about health coverage, which can be complicated and confusing.

Collaborated with health literacy clinicians to provide in-language, culturally resonate messaging and materials.





# Open Enrollment KPI's

## HOW WE MEASURE SUCCESS

We use traditional sets of metrics to measure success including:

- **Message pull-through**
- **Reach**
- **Impressions**
- **Earned media**

We are looking for an agency to deepen our analytical understanding of our reach to better target consumers and strengthen our strategy as we implement our 2023-2026 strategic plan.



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# LOOKING FORWARD To What's Ahead





# Looking Ahead Short Term: Challenges and Opportunities

## CURRENT AND UPCOMING ISSUES

- Increasingly smaller pool of uninsured, who are hard to reach and harder to convince.
- Seeking success in an environment where the media is shrinking and how Californians get information is rapidly changing.
- How can we supplement and enhance our live events during Open Enrollment?
- Go beyond enrollment making sure we are creating equitable access and how we can contribute to a healthier California.



# Looking Ahead Long Term: Challenges and Opportunities

## Looking ahead to the next 5 years

How can Comms and PR, in collaboration with other consumer-facing divisions including Marketing, External Affairs and Community Engagement, and Outreach and Sales to:

- Continue to address information and awareness gaps, and reach the hardest-to-reach and hardest-to-convince consumers through innovative communications technology and tools
- Create internal cross-divisional alignment and synergy with consumer engagement and outreach to maximize impact and create more effective consumer journeys to enrollment
- Position Covered California as a national thought leader and example of a successful state-based marketplace.
- Develop proactive and responsive strategies at a national level to counter and address threats to the ACA



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# REQUEST FOR PROPOSALS

## Housekeeping





# Request for Proposals Housekeeping

- It's the Proposers' responsibility to check this RFP on the Covered California [HBEX](#) website throughout this process.
- RFP #: RFP 2024-15
- For questions, contact Covered California via email at [HBEXSolicitation@covered.ca.gov](mailto:HBEXSolicitation@covered.ca.gov) with "RFP 2024-15" in the subject line.

A screenshot of the Covered California website. The top navigation bar is dark blue with icons for home, Facebook, and Twitter. Below it is the Covered California logo and a navigation menu with links for "About", "Board", "Programs", "Stakeholders", and "Agents". The main content area has a light gray background and features the title "RFP 2024-15 Communications and Public Relations Services". Below the title is a paragraph of text: "The purpose of this Request for Proposal (RFP) is for Covered California to solicit proposals from qualified public communications agencies to serve as the Agency of Record (AOR) for Covered California, and provide multi-segment, integrated public relations and communications services, including developing and executing holistic, local, statewide, and national public relations campaigns in multiple languages to promote Covered California and maximize the number of Californians enrolled in health insurance."



# Request for Proposals

## Key Action Dates

### KEY ACTION DATES

Request for Proposal Release Date	Monday, November 25, 2024
Registration and Questions for Bidders' Conference Due	Friday, December 6, 2024, by 4:30 p.m.
Bidders' Conference (optional webinar)	Wednesday, December 18, 2024 at 9:30 a.m.
Responses Posted By:	Friday, January 3, 2025, at 9:30 a.m.
Stage 1 – Administrative Requirements Due	Friday, January 17, 2025 by noon.
Stage 2 – On-Site Agency Visit Notification	Friday, February 7, 2025 by 4:30 p.m.
Stage 2 – On-Site Agency Visits	Tuesday March 4, 2025 - Wednesday, March 5, 2025
Final Stage Notification	Friday, March 14, 2025 by 4:30 p.m.
Final Stage – Financial Package Due	Tuesday, April 8, 2025 by 4:30 p.m.
Final Oral Presentations	Wednesday, April 9, 2025 – Thursday, April 10, 2025
Notice of Intent to Award	Week of May 5, 2025
Protest Period (5) Workday Period	Ends on Friday, May 16, 2025
Anticipated Contract Start Date	Monday, June 9, 2025

- Key action dates can be found on HBEX Solicitation RFP packet on Page 6.
- REMINDER: Review site regularly for updates.



# Request for Proposals

## Minimum Qualifications

1. A full-service California-based PR agency that has been in business since January 1, 2019. The Proposers' California office shall service Covered California and be maintained throughout the term of the contract.
2. Has a minimum annual gross billing of \$2.5 million in at least two (2) of the past three (3) years, including 2024.
3. The office in California has a minimum of 10 employees that will service the Covered California account.
4. No conflict of interest under Covered California's Conflict of Interest Code, California Code of Regulations, the Political Reform Act, and any other applicable state or federal statutes.



# Request for Proposals Minimum Qualifications

5. The Proposer may submit only one (1) proposal for this RFP.
6. Subcontractors may participate in no more than two (2) proposals.
7. All required minimum qualifications are outlined in Attachment 3 – Proposer Minimum Qualifications Certifications.



# Request for Proposals

## Contract Funding and Length

### **Contract Term**

- The initial term of the contract shall be for three (3) years and one (1) month, from June 9, 2025, to June 30, 2028

### **Contract Amount**

- \$3.5 million per year for the term of the contract, including any extensions of the term.
- Proposals submissions shall not exceed \$10.5 million in total proposed costs.



# Request for Proposals

## Scope of Work

- Will become part of the resulting contract
- The Agency of Record (AOR) is responsible for all deliverables
- 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 prior to the start of every project



# Request for Proposals Agency and Subcontractors

1. Lead agency required to include subs if needed to fulfill SOW.
2. Lead agency is responsible for the proactive management of all subcontractor activities.
3. Subcontractors must complete the following attachments:
  - Attachment 5 – Proposed Subcontractor Agency Fact Sheet
  - Attachment 14 – Staffing Plan and Hourly Rates
  - Attachment 16 – References



# Request for Proposals

## Key Evaluation and Notification Dates

<b>Stage 1</b>	Administrative & Technical Requirements Due	Friday, January 17, 2025 (by 12 p.m. PST)
<b>Stage 2</b>	On-Site Agency Visit Notification	Friday, February 7, 2025 (by 4:30 p.m. PST)
	On-Site Agency Visit	Tuesday, March 4 and Wednesday March 5, 2025
<b>Stage 3</b>	Financial Package Due	Tuesday, April 8, 2025 (by 4:30 p.m. PST)
	Oral Presentations (in Sacramento)	Wednesday, April 9 and Thursday, April 10, 2025
<b>Estimated Contract Start</b>		Monday, June 9, 2025



# Stage 1

# Administrative Requirements

Number	Name
1	Proposal Cover Page
2	Proposal Checklist
3	Proposer's Minimum Qualifications Certification
4	Proposer Agency Fact Sheet
5	Proposed Subcontractor Agency Fact Sheet
6	Guaranty
7	Conflict of Interest
8	Bankruptcy and Litigation Disclosure
9	Payee Data Record (STE 204)
10	Contractor Certification From
11	Statement of Economic Interest Certification (SEI, Form 700)
12	GenAI Reporting and Factsheet
13	Bidder Declaration (GSPD-05-105)
<del>14</del>	<del>Staffing Plan and Hourly Rates</del>
16	Client References



# Stage 1

# Technical Requirements

- 1. Agency Strength and Experience** *(no more than six pages)*
  1. Strengths.
  2. Agency Experience
  3. Multicultural and Ethnic Experience
- 2. Earned Media Placement Effectiveness** *(no more than 7 pages)*
- 3. Understanding and Approach** *(no more than five pages)*
- 4. Project Assumptions** *(no more than two pages)*





# Stage 2 Site Visit

Each Proposer that advances to Stage 2 will be contacted to schedule a date and time when the Covered California Evaluation Team can visit the Proposers' office that would service the account.

- On **Friday, February 7, 2025, by 4:30 p.m.** you will be notified if you will receive a site visit.
- On-Site Agency visits **Tuesday March 4, 2025 – Wednesday, March 5, 2025.**
- The time limit for each site visit is **three (3) hours**
- Time limits will be strictly adhered to
- Staff that would service the Covered California account must play a major role in the Site Visit presentation.
- At least one (1) representative (but no more than two (2)) from each proposed subcontractor that would staff the Covered California account must attend.



## Stage 3

# Oral Presentation & Financial Package

### Oral Presentation

Proposers who move on to Stage 3 will be contacted on March 14, 2025.

### Financial Package

The Financial Package is to be provided to the Covered California Evaluation Team on **Tuesday, April 8, 2025, by 4:30 p.m.** The package is reviewed to ensure all Proposers are financially solvent.



# Award of Contract

## Notice of Intent to Award

- Will be posted on the solicitation website
- All Stage 3 finalists will be notified by email on the week of May 5, 2025

## Protest Period

- 5-day protest period after notice of intent to award is posted
- Ends on Friday, May 16, 2025

Anticipated contract start date is Monday, June 9, 2025



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**Short Break**



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# QUESTION & ANSWERS Session





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**Thank you for attending**