

**RFP 2018-10 – Public Relations Services
Questions and Answers**

QUESTION	ANSWER
<p>1. The Model Contract “Exhibit A” document explains that the “contractor will be required to embed select staff at Covered California’s headquarters located at 1601 Exposition Boulevard...embedded staff will be required to work on-site for the first six-months of the Agreement.” Can you please explain how you’re defining “embedded?” Do you mean that on-site staff will be required to work full-time at Covered California headquarters?</p>	<p>We anticipate the need for the contractor to be embedded 1-2 days a week initially to get fully integrated and at other times during the year upon agreement between the successful bidder and Covered California. This will be as needed determined by Covered California and in partnership with the successful bidder. Ideally it includes a senior member of the team but could also include a junior level account executive. We will be flexible in achieving this provision.</p>
<p>2. As detailed in the RFP Section 4.2.2, the “Administrative Requirements” ask the bidder to provide an updated Model Contract, specifically Exhibit A, Exhibit B and Exhibit C, using track changes. Can you elaborate what you’d like to see for this?</p>	<p>In most cases, the contract is executed as is. However, Covered California may consider limited changes to the contract that do not fundamentally change the Scope of Work or the relationship between the contracting parties.</p>
<p>3. Will the documents requested in “Administrative Requirements Section 4.2.2” be considered in the Stage 1 review process? According to the chart in RFP Section 5.1., these documents will not be reviewed. Can you please clarify the review and scoring process for Stage 1?</p>	<p>Stage 1 is scored on a pass/fail basis. Those submitting Stage 1 documents will move forward to Stage 2, unless documents submitted by the bidders are incomplete or raise questions in which case Covered California will contact the bidder to clarify or ask for further information.</p>
<p>4. In the “Attachments” zip file corresponding to RFP 2018-10, the file name says, “Attachment 2 Form 700,” however, upon opening this file, the title of the text says, “ATTACHMENT 3: Form 700 Statement of Economic Interest Certification.” Can you please confirm that this document is the correct form for “Attachment 2”?</p>	<p>Yes, Form 700 is Attachment 2. This has been updated.</p>
<p>5. How many embedded staff does the State anticipate needing on-site in Sacramento? (RFP-2018-10, Section 3.6, Item 5; page 20)</p>	<p>Please refer to question #1</p>

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<p>6. State requests that bidders present “one recent public relations campaign with a multi-cultural focus that a California-based team designed and implemented” (RFP-2018-10, Section 4.4.2 Case History Presentation; page 28):</p> <ul style="list-style-type: none"> ○ Does the case need to be a California-based initiative, or would another state or national initiative of similar size, scope and population diversity be considered? ○ What does the State consider “recent”? Within the past two years, as requested for other case studies? 	<ul style="list-style-type: none"> • The case history should be a California case designed by a California team. We want to see the best work from that team specifically focused on those we serve. • Correct. We want to see a sample of your work from within the past two years.
<p>7. Is healthcare marketplace experience (running either the Federal government’s marketplaces, or another state marketplace) a requirement to bid?</p>	<p>Health care experience is a plus, but not required.</p>
<p>8. Can you clarify the requirement, “a minimum of 15 employees employed by the Bidder’s California office(s) that will service the Covered California account”? (RFP-2018-10, Section 2.1 Project Team Minimum Qualifications; page 14)</p>	<p>It is not required that 15 people work at all times on the contract, but a significant number should be available to complete the projects during Open Enrollment and as needed.</p>
<p>9. What sorts of disparities are you seeing between ethnic groups in both coverage and health status?</p>	<p>Coverage across all demographics fluctuates. Please refer to our “Resources for Bidders” document “Active Member Profile”. This is the most detailed document we produce surrounding our enrollees.</p>
<p>10. Will the winning bidder have access to all previous analytics and results reports?</p>	<p>The successful bidder will have access to all public reports, and those reports which are confidential might be shared in certain circumstances. It would be determined once the contractor is selected and then a discussion would take place about what kinds of data or analytics the successful bidder would need or want to be successful.</p>
<p>11. What is the impetus for this RFP?</p>	<p>To learn about the current state of public relations and select a contracting partner for the next 3-6 years.</p>

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12. Can you share details as to why you did not choose to extend the current contract with the current agency?	No.
13. As you look ahead, what are your top priorities/focus areas over the next 12-18 months?	Learning about strategies that are beyond traditional PR. We know how to do traditional PR, and that will be important given what could be significant policy changes at the state level. Beyond traditional PR we need to find out what the next generation of PR looks like.
14. How is digital (social, influencers) currently supporting PR?	Currently the Communications and Public Relations office does not use influencers and has a very limited capability in that space. We're looking for all ideas in the digital space.
15. What digital activations have been successful?	In conjunction with marketing, our real people series did well on both Facebook and Instagram. Marketing maintains our main social media presence.
16. What is/is not working with your current agencies?	We are proud of the success. However, we are always looking for new ideas and seek to innovate our public relations regularly as this field continues to evolve.
17. Are you happy with your current digital initiatives? What's working, what's not working?	This is an area we'd like to learn more about.
18. Who are the decision makers?	The Executive Director plays an active role in all public relations and communications efforts as well as the Director of Public Relations and her team. The bids will be scored by an internal Covered California Evaluation Team.
19. How many agencies are being asked to participate in this search? Is the incumbent participating?	This is an open bidding process for anyone to participate. The successful bidder should have the capacity to execute the contract and have all sufficient staff to service the contract. If areas of the contract may be an issue for the any bidder that's where a subcontractor would be necessary.
20. How will you measure success with the agency? What does success look like to you?	We are looking for significant amounts of earned media coverage during Open Enrollment and the ability to reach audiences of scale.
21. What one or two characteristics in an agency do you rank as most important?	This will be determined throughout the process and not something we can detail at this point.
22. What one or two characteristics in an agency do you rank as most important?	See above
23. Can you please share the materials that were hyperlinked on the RFP page (the links provided were not working)?	It's now working.

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<p>24. Would like to confirm, under the Stage 1 Administrative Requirements, Section 4.2.2 Updated Model Contract, that bidders are expected to provide either their recommended changes to or acceptance of the exhibits and attachments named but are not required to submit a full proposed plan or budget at this stage.</p>	<p>This is correct.</p>
<p>25. Page 10, Section 1.11 - the two links provided are not active. Are there revised links?</p>	<p>Links are now active.</p>
<p>26. In the attachments, there is no Client References document/form. On page 30 of the RFP, it is referred to as Attachment 9, but Attachment 9 is a Proposal Checklist. Will you be providing a Client References document/form?</p>	<p>Yes. Client References document will be Attachment 15.</p>

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<p>27. Related to the Proposal Checklist, please advise on the Stage when bidders should submit this item.</p>	<p>Stage 1: Bidders are required to submit the following items for Administrative Requirements:</p> <ul style="list-style-type: none"> • Proposal Cover Page – Attachment 1 • Certificate of Liability Insurance • Proof of automobile liability • Form 700 – Attachment 2 • STD 204 – Attachment 3 • Contractor Certification form – Attachment 4 • Provide comments using track changes to Exhibits A – Scope of Work template • Provide comments using track changes to Exhibits B – Budget Detail • Exhibit B, Attachment 1 – Cost worksheet • Provide Comments using track changes to Exhibit C – General terms and conditions <p>Stage 2: Bidders are required to submit the following technical requirement items at the time of the on-site agency visit:</p> <ul style="list-style-type: none"> • Understanding and Approach • Corporate qualifications • Project Team Qualifications which includes: <ul style="list-style-type: none"> ○ Resumes – See Exhibit C, Attachment 1 ○ Past Projects Complete ○ PR Agency Fact Sheet – Attachment 12 ○ Proposed Subcontractor Fact Sheet – Attachment 13 • Assumptions <p>These are to be provided at the time of the on-site agency presentation:</p> <ul style="list-style-type: none"> • Proposed Account Staff Chart – Attachment 14 • Client Reference Form – Attachment 15 <p>Stage 3: Bidders are required to submit the following documents for the last stage of the RFP – Oral Presentation:</p> <ul style="list-style-type: none"> • A detailed Cost Proposal Assignment – Attachment 10 • Financial Records • Bankruptcy and Litigation Disclosure – Attachment 11
<p>28. Also, regarding the Proposal Checklist, can you confirm if Form STD 213 is an item for bidders to complete?</p>	<p>This is not a required document for bidders to complete.</p>

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<p>29. Per page 23, bidders are requested to provide comments using track changes to Exhibits A, B and C (General Terms and Conditions). Shall bidders also provide comments to Exhibits C (Resumes), D, E and F in the Stage I response? We see that these items are mandatory to submit per the Proposal Checklist, so please advise on the stage where they should be submitted.</p>	<p>Please see answer to question #27</p>
<p>30. Regarding Exhibit A, Scope of Work, page 8, item E. 1, can you please provide more details on Covered California’s expectations of embedded staff working on site for the first six-months of the Agreement (how many staff, what level, etc.)?</p>	<p>See answer to Question #1.</p>
<p>31. Page 29, Section 4.4.4, Account Staff Proposal – is this section containing documents and forms meant to be submitted by itself or shall bidders include these documents/forms with the other written technical requirements to be submitted in Stage 2 for Section 4.3.3, Technical Requirements?</p>	<p>Please have the Account Staff Proposal ready as part of the On-site visit presentation.</p>
<p>32. What is the biggest shift you’d like to see as it relates to your PR and social programming/execution as a result of this RFP?</p>	<p>We want to hear from you what we need to do to continue our success with earned media and make progress reaching large audiences on digital platforms.</p>
<p>33. How closely linked are the paid media and PR contracts, and do you see opportunity to more closely align the two not only in strategy, but in execution?</p>	<p>Yes.</p>

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<p>34. While Covered California has had extraordinary success in reaching and enrolling the uninsured, what do you feel is the greatest unrealized opportunity for the exchange that could be realized through strategic communications?</p>	<p>The message of affordability, and that people can get help paying for insurance. Research indicates people “think” they can’t afford it and that continues to be a barrier to enrollment.</p>
<p>35. As part of our strategic planning approach, we focus on developing insights about priority segment audiences and how to engage them. Do you have audience segmentation data that you can share during the proposal process, beyond the demographic segments outlined in the RFP?</p>	<p>Our most recent snapshot of enrollment by demo is listed in the Resources for Bidders document. The numbers detailed by demo have typically remained steady, however we know those outlined can be improved. We’re looking for the best ideas to move the needle for those areas. https://hbex.coveredca.com/solicitations/RFP-2018-10/downloads/Covered_California_Resources_for_Bidders.pdf</p>
<p>36. What KPIs does Covered California use for evaluating the effectiveness of local events?</p>	<p>Coverage in local markets is important and our data indicates Californians still hear about us through local media which is why earned media is so important to us. See Section “D” of the Scope of Work where we outline objectives for media segments and coverage goals.</p>
<p>37. Can you share analytics for the past open enrollment period? Can you tell us more about business goals and metrics for each period?</p> <ul style="list-style-type: none"> • Open Enrollment Period (OEP) <ul style="list-style-type: none"> ○ What percent of net new member accounts are acquired during OEP? ○ What percent of existing member accounts are retained during OEP? • Special Enrollment <ul style="list-style-type: none"> ○ What percent of net new member accounts are acquired during special enrollment? ○ What percent of existing member accounts are retained during special enrollment? 	<p>For information on enrollment from the last open enrollment period please refer to the Resources for Bidders document. https://hbex.coveredca.com/solicitations/RFP-2018-10/downloads/Covered_California_Resources_for_Bidders.pdf</p> <p>During open enrollment typical forecasts estimate we enroll between 300,000-400,000 thousand people. This will fluctuate over time.</p> <p>The most recent renewal figure is detailed in our Resources for Bidders section. Refer to our end of open enrollment press release.</p> <p>Monthly special enrollment ranges between 20,000-25,000.</p> <p>Each year we have a churn rate of around 40 percent. This means that in any given coverage year we lose 40 percent of those enrolled. This is normal and shouldn’t be seen as a negative. The reason is people get job-based coverage, age into Medi-Care, transition to Medi-Cal etc.</p> <p>Business goals are to increase the number of insured Californians, improve health care quality, lower costs, and reduce health disparities.</p>

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<p>38. We understand that a goal is to demonstrate Covered California is a proving ground for the nation – how important is it to gain national exposure to audiences outside of California?</p>	<p>We've been a thought leader on a national stage and wish to continue that proactive engagement.</p>
<p>39. How many events have you typically had your agency plan and support throughout OEP? Special Enrollment? For budgeting and proposal purposes, should we assume the same number?</p>	<p>Anywhere between 20-30 total events during open enrollment has been an average. These might include full press events, press availabilities, editorial boards and meet and greets with stakeholders. We anticipate having large scale events promoting open enrollment but cannot assume we'll continue with the same number (up or down). Events during special enrollment would be limited. Typically, we don't have events supported by the contractor during this time, but possibilities might include our rate announcement (July) or renewal (October).</p>
<p>40. Crisis communications is listed in Section 2.2 of the RFP but not detailed in the SOW. Would you please outline the scope of services expected around crisis communications.</p>	<p>The potential range of services could include:</p> <ul style="list-style-type: none"> • Strategic counsel • Preparation of materials • Message development • Possibly logistics and event planning • Please refer to Section "F" of the SOW. This is an example of the kind of Crisis Communications we'd look to the contractor to advise on and create solutions to.
<p>41. Exhibit A – SOW mentions the management of "paid/earned media hybrid strategies." Would you please provide more detail around services expected around paid media and whether costs associated with paid media would come out of the \$2.5M annual budget?</p>	<p>We are looking for bidders to make recommendations about potentially using paid strategies for public relations purposes (as distinct from advertising) and any such programs would come out of the \$2.5 million budget.</p>
<p>42. Who is part of the decision committee and who will participate in the on-site agency visit?</p>	<p>You'll meet the team during the site visits, but they'll be representatives from Covered California.</p>
<p>43. Do you have a limit on how many agencies you will move into Rounds 2 and 3, respectively?</p>	<p>No defined limit for Stage 2 and 3.</p>

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<p>44. There are several references to the importance of Latino and API audiences. Do you have a preferred split in mind for how each audience should be weighted?</p>	<p>Our goal for Open Enrollment is to reach 18 – 64-year olds who are uninsured but don't know they are eligible for subsidy. Keep in mind our total enrollment hovers around 88-90 percent receiving subsidies and 10-12 percent do not.</p> <p>While there is no reliable estimated subsidy eligible uninsured data available, we estimate there are approximately 1.2 million eligible uninsured remaining in California. That figure takes into consideration both the subsidy and non-subsidy eligible population and does not include the undocumented population as they are currently not eligible to purchase through Covered California.</p> <p>If our current self-reported enrollee breakdown were to remain consistent, the ballpark percentage would include:</p> <p>Caucasian: 37 percent Latino: 27 percent Asian: 24 percent African American: 2 percent</p> <p>We look to vendor to make recommendations on appropriate level of focus.</p>
<p>45. Would a bidder's relationship with a tobacco or alcohol company be considered a conflict?</p>	<p>No.</p>
<p>46. Can a bidder receive both preference points for having a DVBE-certified and an SB-certified subcontractors? In other words, 5% additional preference points each for using SB-certified subcontractors and DVBE-certified subcontractors, for a total of 10%?</p>	<p>Bidders can technically receive both preferences if they meet all the qualifications as set forth in the RFP. The SB preference is a 5% bonus to the total score. The DVBE is a 1-5% bonus added to the non-cost score (the oral presentation). It is important to note that any incentive bonus can only apply to those bidders who advance to Stage 3, because that is the only stage where the evaluators issue a numerical score.</p>
<p>47. Can case studies from subcontractors be included to support the overall bid?</p>	<p>All bidders and proposed subcontractors should submit whatever they deem appropriate.</p>

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<p>48. The RFP asks bidders to describe up to five projects completed in the past two years related to the tasks listed in Model Contract Exhibit A – Scope of Work. Will Covered California consider projects similar to the tasks listed that are not from the past two years, but within the past five years?</p>	<p>Per RFP, we are asking bidders to describe up to five projects completed in the past two years. Anything prior to two years will not be evaluated.</p>
<p>49. Exhibit A - In the section labeled General Scope or Tasks, please clarify the language around staffing and managing the implementation of phonebanks throughout the state. How often and how many phone banks does Covered CA expect the contractor to manage and/or staff?</p>	<p>We look to vendor to make recommendations. In the past, Covered California has partnered with Spanish Language media to do phone banks and could be extended to Asian language stations as well.</p>
<p>50. Exhibit A- With respect to the reference to developing communications strategies that are evidence-based, does Covered CA have existing bodies of recent research that can help inform the strategy? (e.g. recent message-testing, etc.)</p>	<p>We would provide this information at the time of the contract.</p>
<p>51. Exhibit A - Regarding the evaluation of cost efficiency as compared to industry standards and Covered California benchmarks, can you provide insight into what the Covered CA benchmarks are?</p>	<p>Generally speaking, we place a high value on earned media and reaching targeted segment audiences. Cost efficiency will vary from project to project.</p>

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<p>52. Exhibit A -The Scope of Work mentions the contractor will need to have capacity to hire video production services in the event that Covered CA requires video production. Since this need may or may not arise, is it required that bidders include this in the overall project budget or will Covered CA incur costs as needs arise?</p>	<p>We would work with the contractor to find the appropriate vendor to render the required services. Covered California does have a fully operational video production team. Bidders are not required to include video production in the overall project budget.</p>
<p>53. Exhibit A -How many select staff will be required to embed at Covered CA's headquarters?</p>	<p>Please refer to question #1.</p>
<p>54. The target is quite broad. Can you provide a breakdown of prioritization based on your KPI's/enrollment data?</p>	<p>2018 September Active Member Profiles can be found here which details our member demographics and percentages of each enrolled:</p> <p>https://hbex.coveredca.com/data-research/library/active-member-profiles/CC_Membership_Profile_2018_09.xlsx</p>
<p>55. Any information on how budget has previously been allocated across media and target?</p>	<p>Previous budget allocation is not applicable to RFP requirements.</p>
<p>56. Any insight into how the PR agency and Advertising agency work together, if at all. Shared assets. Messaging. Conceptual migration for fluidity?</p>	<p>We work to integrate whenever and where ever possible, but we would like to see more of this and welcome recommendations for greater integration.</p>
<p>57. Section 3.5/1: expand on 'trackers'. Is there a program needing to be used. If so, which?</p>	<p>No specific required technological tracker.</p>
<p>58. Section 3.6/5: For the embedded on-site staff, is this full-time and/or as needed. How many are expected to be embedded? Any level expectations?</p>	<p>See answer to question #1</p>
<p>59. With respect to introducing “fresh and innovative ideas that will continue to move the org forward and promote enrollment” what example from recent work would you classify as executions that moved the needle with your audiences?</p>	<p>Three items: Our bus tour earned media campaigns, Instagram Stories which garnered more than 10,000 views and our partnership with Spanish language TV stations for phone banks.</p>

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<p>60. Attachment 2 is stated as “Form 700 Statement of Economic Interest Certification” however when downloaded the document is referenced as “attachment 3” - can you clarify what attachment this should be referenced as?</p>	<p>Please see response to question #4.</p>
<p>61. Attachment 3 titled “Payee Data Record” is not online. When will you make this available?</p>	<p>This is fixed now.</p>
<p>62. In terms of digital public relations and traditional media relations, can you elaborate on which areas are more important for Covered California?</p>	<p>We will look to vendor to recommend the mix.</p>
<p>63. We wanted to confirm that our firm can subcontract to other agencies, as long as they are identified in our RFP response, for work in other languages or culturally-specific work?</p>	<p>Correct.</p>
<p>64. Our firm has been in California for 3 years, but our billings have greatly exceeded the \$1.5M threshold outlined in section 2.1 in each of those three years. We serve some of the largest organizations in the world. Are there any exceptions granted for the number of years in California?</p>	<p>Per section 2.1, bidder must be a currently operating, full service PR Firm with a presence in California since 2014.</p>
<p>65. Section 3.6 refers to “embedded onsite staff” in Sacramento. Is this a full-time requirement, or just the ability to embed as-needed, or other?</p>	<p>See answer to question #53</p>
<p>66. We have a question confused about the billing process. We typically work on a monthly retainer. There are a lot of references to tracking hours of the people who work on the project, but it also seems like there is a bid for an annual contract. The question is whether the chosen vendor is to bill hourly rates for the work performed, regardless of what the winning bid is -- or whether there is a fixed monthly retainer that covers all the work performed by the chosen vendor, regardless of person-hours worked?</p>	<p>Work will be billed at hourly rates. In the past, we’ve worked with embed retainers, but retainer rates will be based on future needs.</p>

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