

THE DISTRICT OF COLUMBIA HEALTH BENEFIT EXCHANGE AUTHORITY



REQUEST FOR PROPOSALS

FOR

**FULL SERVICE COMMUNICATIONS AND MARKETING SERVICES TO SUPPORT
THE DISTRICT OF COLUMBIA'S DISTRICT-BASED HEALTH INSURANCE
EXCHANGE**

SOLICITATION NUMBER: DCHBX-2013-0007

RFP Issue Date: June 3, 2013

RFP Due Date: June 24, 2013

Prospective Offerors who have received this document from the DC Health Benefit Exchange Authority's (DCHBX) website and wish to assure receipt of any changes or additional materials related to this RFP, should immediately contact the Contracting Officer by email and provide their name and mailing address so that addenda to the RFP or other communications can be sent to them.

Key Information Summary Sheet

DISTRICT OF COLUMBIA HEALTH BENEFIT EXCHANGE AUTHORITY (DCHBX)

COMMUNICATIONS AND MARKETING SERVICES TO SUPPORT THE DISTRICT OF COLUMBIA'S District-BASED HEALTH INSURANCE EXCHANGE

SOLICITATION NUMBER: DCHBX-2013-0007

RFP Issue Date: June 3, 2013

Contracting Officer: **Paula I. Walker**
Contracting Officer
District of Columbia Health Benefit Exchange Authority
441 4th Street, NW, Suite 870 North
Washington, DC 20001
Phone: 202-741-0846
Email: paula.walker@dc.gov

**Contracting Officer's
Technical Representative
(COTR)** **Richard Sorian**
Director of Communications, Education & Outreach
District of Columbia Health Benefit Exchange Authority
441 4th Street, NW, Suite 870 North
Washington, DC 20001

Pre-Proposal Conference: **DATE: June 6, 2013**
TIME: 2:00 PM
LOCATION: 441 4th Street, NW, 11th Floor
Washington, DC 20001

Closing Date and Time: **DATE: June 24, 2013**
TIME: 6:00 PM

Proposals are to be sent to: District of Columbia Health Benefit Exchange Authority
Attention: Paula Walker, Contracting Officer
441 4th Street, NW, Suite 870 North
Washington, DC 20001

**Certified Business Enterprise
Subcontracting Goal:** 25%

NOTICE:

Prospective Offerors who have received this document from the DC Health Benefit Exchange's website or the DC Office of Contracting and Procurement's e-Sourcing web portal, or who have received this document from a source other than the Contracting Officer, and who wish to assure receipt of any changes or additional materials related to this RFP, should immediately contact the Contracting Officer by email and provide their name and mailing address so that amendments to the RFP or other communications can be sent to them.

Table of Contents

SECTION 1 - GENERAL INFORMATION	5
1.1 SUMMARY STATEMENT	5
1.2 PRE-PROPOSAL CONFERENCE.....	5
1.3 PROPOSALS DUE (CLOSING) DATE.....	5
1.4 QUESTIONS.....	6
1.5 CONTRACT DURATION	6
1.6 PROCUREMENT OFFICER	6
1.7 CONTRACTING OFFICER’S TECHNICAL REPRESENTATIVE (COTR).....	6
1.8 CERTIFIED BUSINESS ENTERPRISES NOTIFICATION	7
1.9 CERTIFIED BUSINESS ENTERPRISES	7
1.10 MULTIPLE OR ALTERNATE PROPOSALS.....	8
1.11 CANCELLATIONS; ACCEPTANCE; MINOR IRREGULARITIES AND DISCUSSIONS.....	8
1.12 ORAL PRESENTATION	8
1.13 DURATION OF OFFER	8
1.14 PUBLIC INFORMATION ACT NOTICE.....	8
1.15 “CLEAN HANDS” TAX AFFIDAVIT	9
1.16 BID/PROPOSAL AFFIDAVIT	9
1.17 CONTRACT AFFIDAVIT	9
1.18 CONTRACT TYPE.....	9
1.19 PROCUREMENT METHOD	9
1.20 MANDATORY CONTRACTUAL TERMS	9
1.21 PROTESTS/DISPUTES.....	10
1.22 REVISIONS TO THE RFP.....	10
1.23 INCURRED EXPENSES	10
1.24 ECONOMY OF PREPARATION	10
1.25 OFFEROR RESPONSIBILITIES	10
1.26 LIVING WAGE REQUIREMENTS	11
1.27 FEDERAL-FUNDING REQUIREMENTS AND AFFIDAVITS	11
1.28 SUBSTITUTION OF PERSONNEL.....	11
1.29 ATTACHMENTS.....	12
THE FOLLOWING LIST OF ATTACHMENTS IS INCORPORATED INTO THE SOLICITATION BY REFERENCE:	12
SECTION 2 – MINIMUM QUALIFICATIONS	13
SECTION 3 – SCOPE OF WORK	14
3.1 BACKGROUND AND PURPOSE	15
3.2 SCOPE OF WORK.....	16
SECTION 4 – PROPOSAL FORMAT	16
4.1 TWO PART SUBMISSION	27
4.2 PROPOSALS	27
4.3 SUBMISSION	27
4.4 VOLUME I – TECHNICAL PROPOSAL.....	27
4.5 VOLUME II – FINANCIAL PROPOSAL.....	34
SECTION 5 – EVALUATION CRITERIA AND SELECTION PROCEDURE	35
5.1 EVALUATION CRITERIA	35

5.2	TECHNICAL CRITERIA.....	35
5.3	FINANCIAL CRITERIA.....	35
5.4	SELECTION PROCEDURES.....	35
5.5	AWARD DETERMINATION.....	36

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SECTION 1 - GENERAL INFORMATION

1.1 Summary Statement

This Request for Proposals (“RFP”) is to solicit proposals that will enable the District of Columbia Health Benefit Exchange Authority (DCHBX) to select the most qualified Offeror to plan, develop, design and execute an integrated communications and marketing campaign to inform and educate individuals and small businesses in the District of Columbia and about the new health insurance coverage options available through its District-based health insurance exchange. The campaign is being funded through a grant from the Federal Center for Consumer Information & Insurance Oversight (“CCIIO”) under the Patient Protection and Affordable Care Act (93.525).

1.2 Pre-Proposal Conference

A Pre-Proposal Conference will be held on June 6, 2013 from 2:00 pm to 3:30 pm at the 441 4th Street, NW, 11th floor. Attendance at the Pre-Proposal Conference is not mandatory, but all interested Offerors are encouraged to attend in order to facilitate better preparation of their proposals. In addition, attendance may facilitate the Offerors overall understanding and ability to meet the DCHBX Certified Business Enterprise (CBE) goals.

After the Pre-Proposal Conference, a written summary of the Pre-Proposal Conference and all questions and answers known at that time will be made available on the DCHBX website and the Office of Contracting and Procurement’s e-Sourcing website.

In order to ensure adequate seating and other accommodations at the Pre-Proposal Conference, please submit the Pre-Proposal Conference Response Form (Attachment G) prior to the conference date to the attention of Paula Walker via e-mail. The Pre-Proposal Conference Response Form is included as Attachment G to this RFP. In addition, if there is a need for sign language interpretation and/or other special accommodations due to a disability, please contact the Ms. Walker **no later than 2:00 pm on June 5, 2013**. The DCHBX will make a reasonable effort to provide such special accommodation.

1.3 Proposals Due (Closing) Date

Offerors shall submit an unbound original and six (6) bound copies of each proposal (technical and cost) shall be received by the DCHBX Contracting Officer, at the address listed in Section 1.7, no later than **6:00 PM (Local Time) on June 24, 2013**, in order to be considered. Two electronic versions on a flash drive or CD of the Technical Proposal in MS Word format shall be enclosed with the original Technical Proposal. Two electronic versions on a flash drive or CD of the Cost Proposal in MS Word or Excel format shall be enclosed with the original Cost Proposal. Ensure that each of the four CDs are labeled with the RFP title, RFP project number, and Offeror name and packaged with the original copy of the appropriate proposal (technical or financial).

Offerors mailing proposals should allow sufficient mail delivery time to ensure timely receipt by the DCHBX Contracting Officer. Proposals received by the Contracting Officer after the due date, **June 24, 2013 at 6:00 PM** (Local Time) will not be considered.

Proposals may not be submitted by e-mail or facsimile.

1.4 Questions

Written questions from prospective Offerors will be accepted by the Contracting Officer prior to the pre-proposal conference. As soon as reasonably possible and appropriate, such questions will be answered at the pre-proposal conference. (No substantive question will be answered prior to the pre-proposal conference.) Questions may be submitted by mail, or preferably, by e-mail to the Contracting Officer (paula.walker@dc.gov). Questions, both oral and written, will also be accepted from prospective Offerors attending the Pre-Proposal Conference. As soon as reasonably possible and appropriate, these questions will be answered at the Pre-Proposal Conference, or shortly thereafter.

Questions will also be accepted subsequent to the Pre-Proposal Conference until June 10, 2014 **at 4:00 PM**, to the Contracting Officer. By **June 13, 2013**, answers to all substantive questions will be made available on the DCHBX's website and the Office of Contracting and Procurement's web portal.

1.5 Contract Duration

The contract term shall be for a base year of one year from the date of award, with four (4) one year option periods. The Contractor shall conduct any necessary due diligence, and familiarize itself with the District's operations and the DCBX before commencement of the contract, at no cost to the DCHBX or the District of Columbia.

1.6 Procurement Officer

The sole point of contact for the DCHBX for purposes of this RFP prior to the award of any Contract(s) is the Contracting Officer at the address listed below:

Paula I. Walker
Contracting Officer
District of Columbia Health Benefit Exchange Authority
441 4th Street, NW, Suite 870 North
Washington, DC 20001
Phone: 202-741-0846
Email: paula.walker@dc.gov

1.7 Contracting Officer's Technical Representative (COTR)

The COTR is:

Richard Sorian
Director of Communications, Education & Outreach
District of Columbia Health Benefit Exchange Authority
441 4th Street, NW, Suite 870 North
Washington, DC 20001

The DCHBX may change the COTR at any time by written notice to the Contractor.

1.8 Certified Business Enterprises Notification

The Certified Business Enterprise (CBE) Program provides District-based firms with advantages in doing business with the District Government, and expands the availability of business opportunities with District-sponsored development projects.

In order to be eligible for CBE certification, a business enterprise must meet a local standard to demonstrate that it is a bona fide District-based business. Among other requirements, the business enterprise must have its principal office located in the District, and maintain a District-based office in which the chief executive officer and senior leadership team perform the firm's managerial functions. In addition, the enterprise must meet one of four standards:

- More than 50 percent of its assets are located in the District;
- More than 50 percent of its total sales or other revenues are derived from transactions in the District;
- More than 50 percent of its employees are District residents; or,
- More than 50 percent of the owners are District residents.

Eligible vendors are encouraged to obtain certification from the DC Department of Small and Local Business Development (DSLBD). All questions related to certification should be directed to the Department of Small and Local Business Development.

Director, Department of Small and Local Business Development
441 4th Street, NW, Suite 970 North, Washington, DC 20001
Phone: (202) 727-3900
Fax: (202) 724-3786
TTY: (202) 727-3900
Email: dsldb@dc.gov

If the Offeror or a subcontractor is currently a certified business enterprise in the District of Columbia, it should be so indicated with the certification number in the Technical Proposal.

1.9 Certified Business Enterprises

A Certified Business Enterprise (CBE) subcontractor participation goal of 25% has been established for this procurement. Only businesses certified by the District of Columbia Department of Small and Local Business Development can be counted towards achievement of this goal. **CBE requirements are specified in Attachment D of this RFP.**

For any questions about the CBE subcontractor participation goals, proper completion of CBE Affidavits, or the CBE program in general, please contact the Contracting Officer prior to the Proposals Due (closing) date. Questions or concerns regarding the CBE requirements of this solicitation must be raised before the opening of initial technical proposal(s).

The Contractor shall structure its award(s) of subcontracts under the Contract in a good faith effort to achieve the goal in such subcontract awards by businesses certified by the District of Columbia. CBE requirements are specified in Attachment D, "Certified Business Enterprise Participation." Subcontractors used to meet the CBE goal must be identified in the Offeror's proposal and must be certified to perform all work proposed.

Attachment D-1, "CBE Utilization and Fair Solicitation Affidavit," must be properly completed and submitted with each Offeror's proposal. Complete means that every CBE has been identified and the requested information provided. An Offeror that does not commit to meeting the CBE participation goal outlined in this Section must submit a request for a full or partial waiver with its proposal submission based upon its outreach prior to submission of its proposal. **Failure of an Offeror to properly complete, sign, and submit Attachment D-1 at the time of submission of the Technical Response to this RFP will result in the DCHBX's rejection of the Offeror's Proposal to the RFP. This failure is not curable.**

A current directory of CBEs is available through the District of Columbia Department of Small and Local Business Development, 441 4th Street, NW, Suite 970 North, Washington, DC 20001. The phone number is (202) 724-3786. The directory is also available at <http://dslbd.dc.gov/>. The most current and up-to-date information on CBEs is available via the website.

1.10 Multiple or Alternate Proposals

Neither multiple nor alternate proposals will be accepted.

1.11 Cancellations; Acceptance; Minor Irregularities and Discussions

The DCHBX reserves the right to cancel this RFP, accept or reject any and all proposals, in whole or in part, received in response to this RFP, to waive or permit cure of minor irregularities, and to conduct discussions with all qualified or potentially qualified Offerors in any manner necessary to serve the best interests of the DCHBX. The DCHBX also reserves the right, in its sole discretion, to award a Contract based upon the written proposals received without prior discussions or negotiations.

1.12 Oral Presentation

Offerors deemed susceptible of being selected for award may be required to provide an Oral/Capabilities Presentation in an effort to clarify information contained in their proposals. The discussions will also assure a full understanding of the DCHBX's requirements and the Offeror's ability to perform the requirements stated in this RFP. Offerors must confirm in writing any substantive oral clarification of, or change in, their proposals made in the course of discussions. Any such written clarification or change then becomes part of the Offeror's Proposal

The Contracting Officer will notify Offerors of the time and place of oral presentations. **Offerors should be prepared to make oral presentations during the week of June 24, 2013.**

1.13 Duration of Offer

Proposals submitted in response to this RFP are irrevocable for 120 days following the later of the closing date of proposals or of Best and Final Offers (BAFOs), if requested. This period may be extended at the Contracting Officer's request only with the Offeror's written agreement.

1.14 Public Information Act Notice

An Offeror shall give specific attention to the clear identification of those portions of its proposal that it considers confidential, proprietary commercial information or trade secrets, and provide justification why such materials, upon request, should not be disclosed by the DCHBX. Offerors are advised that, upon request for this information from a third party, the Contracting Officer is

required to make an independent determination whether the information can be disclosed. **Information which is claimed to be confidential is to be identified *after* the Title Page and *before* the Table of Contents in the Technical Proposal and, if applicable, also in the Cost Proposal.**

1.15 “Clean Hands” Tax Affidavit

All Offerors shall abide by the terms of District of Columbia’s “Clean Hands” law referenced in the Attachments, by submitting a response to this solicitation, each Offeror represents that it is not in arrears in the payment of any obligations due and owing the District of Columbia, including the payment of taxes and employee benefits. If the Offeror fails to complete and submit the required Tax Affidavit documentation, the District may determine an Offeror to be not responsive. The successful Offeror shall meet these requirements for the duration of the Contract.

1.16 Bid/Proposal Affidavit

A proposal submitted by an Offeror shall be accompanied by a completed Bid/Proposal Affidavit. A copy of this Affidavit is included as Attachment B of this RFP.

1.17 Contract Affidavit

All Offerors are advised that if a Contract is awarded as a result of this solicitation, the successful Offeror will be required to complete a Contract Affidavit. A copy of this Affidavit is included for informational purposes as Attachment C of this RFP. This Affidavit shall be provided to the Procurement Officer within five business days of notification of proposed Contract award.

1.18 Contract Type

The Contract that results from this solicitation shall be firm fixed-price with a cost reimbursable component pursuant to the Scope of Work (Section 3) to support the placement and purchase of paid media through this Contract and any optional task orders issued pursuant to Section 3.7. The creative conception and design of collateral materials are included within the Scope of Work (Section 3); however, additional services related to the production and printing of related collateral materials are not included within the budget and may be procured on a per-project basis. **Funds for this procurement are available through a grant from the Center for Consumer Information and Insurance Oversight (CCIIO) under the Affordable Care Act (ACA), and are contingent upon continued federal support.**

1.19 Procurement Method

This Contract will be awarded in accordance with the Competitive Sealed Proposals process under the Procurement Policies and Procedures of the Health Benefit Exchange Executive Board of Directors. A copy of the PP&P may be found on the website of the DCHBX at www.dchbx.com.

1.20 Mandatory Contractual Terms

By submitting an offer in response to this RFP, an Offeror, if selected for award, shall be deemed to have accepted the terms of this RFP and the Contract, attached as Attachment A. **Any exceptions to this RFP or the Contract shall be clearly identified in the Executive**

Summary of the technical proposal; exceptions to the required format, terms and conditions of the Cost Proposal must also be clearly identified in the Executive Summary, without disclosing any pricing information. All documentation required in the Attachments section (1.29) must be submitted with the proposal. A proposal that takes exception to these terms may be rejected.

1.21 Protests/Disputes

Any protest related to this solicitation shall be subject to the provisions of the PP&P. Any contract dispute related to the resulting Contract shall be subject to the Disputes provision set forth in the Contract, a copy of which is Attachment A hereto.

1.22 Revisions to the RFP

If it becomes necessary to revise this RFP before the due date for proposals, amendments will be provided to all prospective Offerors who were sent this RFP or otherwise are known by the Contracting Officer to have obtained this RFP. In addition, amendments to the RFP will be posted on the DCHBX website and through the DC Office of Contracts and Procurement's e-Sourcing web portal. Amendments made after the due date for proposals will be sent only to those Offerors who submitted a timely proposal.

Acknowledgment of the receipt of all amendments to this RFP issued before the proposal due date shall accompany the Offeror's proposal in the Transmittal Letter accompanying the Technical Proposal submittal. Acknowledgement of the receipt of amendments to the RFP issued after the proposal due date shall be in the manner specified in the amendment notice. Failure to acknowledge receipt of amendments does not relieve the Offeror from complying with all terms of any such amendment.

1.23 Incurred Expenses

The DCHBX will not be responsible for any costs incurred by an Offeror in preparing and submitting a proposal, in making an oral presentation, in providing a demonstration, or in performing any other activities relative to this solicitation. DCHBX will not be responsible for returning samples of work.

1.24 Economy of Preparation

Proposals should be prepared simply and economically, providing a straightforward, concise description of the Offeror's proposal to meet the requirements of this RFP.

1.25 Offeror Responsibilities

The selected Offeror shall be responsible for rendering services within the category for which it has been selected as required by this RFP. All subcontractors shall be identified and a complete description of their roles relative to the proposal shall be included in the Offeror's proposal. Additional information regarding CBE subcontractors is provided in Section 1.9 previously.

If an Offeror that seeks to perform or provide the services required by this RFP is the subsidiary of another entity, all information submitted by the Offeror, such as but not limited to, references, financial reports, or experience, shall pertain exclusively to the Offeror, unless the parent organization will guarantee the performance of the subsidiary. If applicable, the Offeror's

proposal shall contain an explicit Statement that the parent organization will guarantee the performance of the subsidiary. Subcontractors retained for the sole purpose of meeting the established SBE participation goal(s) for this solicitation shall be identified as provided in Attachment D of this RFP.

1.26 Living Wage Requirements

While the DCHBX is an exempt unit under Division II of the District Finance and Procurement (SFP) Article, the DCHBX requires the Offeror to pay the living wage amounts, as contemplated by Title 18 of the SFP Article and any accompanying regulations. Additional information regarding the District's Living Wage requirement is contained in this solicitation (see Attachment H, Living Wage Requirements for Service Contracts). If the Offeror fails to complete and submit the required Living Wage documentation, the District may determine an Offeror to be not responsive.

1.27 Federal-Funding Requirements and Affidavits

This solicitation contains federal funds through a federal grant: Cooperative Agreement to Support Establishment of District-Operated Health Exchanges (CFDA number 93.525). Accordingly, there are programmatic conditions that apply to this contract, which are contained in Attachment J. Each Offeror shall complete and submit the necessary Affidavits within Attachment J with its Technical proposal. Acceptance of a contract indicates the Offeror's intent to comply with all federal conditions, which are part of the Contract.

1.28 Substitution of Personnel

All personnel described in the Offeror's proposal, or identified at the initiation of the Contract as key staff or key personnel, shall perform continuously for the duration of the Contract and for so long as performance is satisfactory to the COTR.

The Offeror may not substitute key personnel, other than by reason of an individual's death, sudden illness, termination of employment, or other extraordinary circumstances without the prior written approval of the COTR. To replace any key personnel specified in the Offeror's proposal, the Offeror shall submit to the COTR: a) a detailed explanation of the reason(s) for the substitution request; b) the resumes of the proposed substitute personnel; c) the official resume of the current personnel for comparison purposes; and d) copies of any required credentials. The Offeror shall make this submission at least two (2) weeks prior to the desired effective date of substitution. All proposed substitute personnel shall be interviewed by the Exchange, shall have qualifications at least equal to those of the replaced personnel, and shall be approved by the COTR. The COTR will notify the Offeror in writing of the acceptance, denial, contingent or temporary approval for a specified time limit, of the proposed substitute personnel. The COTR will not unreasonably withhold approval of a requested key personnel replacement.

The COTR may direct the Offeror to replace any staff that the COTR deems as being unqualified, non-productive, unable to fully perform his/her job duties, disruptive, has committed a major infraction of law or District requirements, or for any other good faith basis. Normally, the COTR shall give written notice of performance issues to the Offeror, clearly describing the problem and delineating remediation requirement(s). The Offeror shall respond with a written remediation plan within three (3) business days and implement the plan immediately upon

written acceptance of the COTR . If performance issues persist, the COTR may give written notice or request the immediate removal of person(s) whose performance is at issue, and determine whether a substitution is required. If so required, the individual(s) shall be replaced within 15 days of the notice of performance issues.

If deemed appropriate in the sole discretion of the COTR, the COTR shall direct that the individual be replaced immediately and without notice or a remediation plan.

1.29 Attachments

The following list of attachments is incorporated into the solicitation by reference:

Attachment Number	Document
1.29A	Government of the District of Columbia Standard Contract Provisions for Use with the Supplies and Services Contracts (March 2007): Available at www.ocp.dc.gov click on "Solicitation Attachments"
1.29B	U.S. Department of Labor Wage Determination (06/19/2012): Available at www.wdol.gov
1.29B	Office of Local Business Development Equal Employment Opportunity Information Report and Mayor's Order 85-85: Available at www.ocp.dc.gov click on "Solicitation Attachments"
1.29B	Department of Employment Services First Source Employment Agreement: Available at www.ocp.dc.gov click on "Solicitation Attachments"
1.29B	Way to Work Amendment Act of 2006 - Living Wage Notice: Available at www.ocp.dc.gov click on "Solicitation Attachments"
1.29B	Way to Work Amendment Act of 2006 - Living Wage Fact Sheet: Available at www.ocp.dc.gov click on "Solicitation Attachments"
1.29B	Tax Certification Affidavit: Available at www.ocp.dc.gov click on "Solicitation Attachments"
1.29B	Bidder/Offeror Certifications: Available at www.ocp.dc.gov click on "Solicitation Attachments"

SECTION 2 – MINIMUM QUALIFICATIONS

2.1 Minimum Qualifications

The Contracting Officer will establish an Evaluation and Selection Committee to review and evaluate all proposals that meet the minimum qualifications, including:

- Location of Offeror's place of business, where the main account team servicing this Contract, shall be located within a 100 mile radius of zip code 20001 requiring no more than a two (2) hour driving time in order for the DCHBX team to conduct routine on-site visits;
- Identification of primary day-to-day contacts for advertising and public relations who each have a minimum of 10 years of experience in their respective fields and will be assigned to this Contract;
- Prior experience developing and executing successful broad marketing, outreach and education campaigns for health care programs;
- Prior experience developing and executing successful integrated advertising campaigns (print, radio, television, outdoor, online, mobile, etc.) to launch community-wide awareness initiatives;
- Prior experience developing and executing successful public relations campaigns in the health care and consumer product categories;
- Demonstrated experience with projects or marketing/communications campaigns involving outreach and education to diverse or "hard to reach" populations;

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SECTION 3 – SCOPE OF WORK

3.1 Background And Purpose

Shortly after the enactment of the Patient Protection and Affordable Care Act of 2010 (ACA), the District of Columbia initiated a multi-agency, coordinated effort to actively implement its provisions. In accordance with the ACA, the District enacted legislation in January 2012 to establish a qualified health benefit exchange (HBX). The District law is referred to as the Health Benefit Exchange Authority Establishment Act of 2011. The law called for the appointment of a seven-member Health Benefit Exchange Authority Board. The Board was sworn in on July 17, 2012, and is responsible for the implementation of the HBX in the District.

In December 2012, the District became one of the first jurisdictions in the nation granted conditional approval to establish a District-based marketplace to facilitate the sale of private health insurance to eligible residents and small businesses. Since that time, the District has made significant progress in building an innovative web-based portal that will provide residents and employers with a one-stop market for a wide variety of insurance products that will allow side-by-side comparisons of high-quality insurance plans and access to federal tax credits available to certain individuals, families, and small businesses to reduce the cost of coverage.

Beginning October 1, 2013, the District's HBX will begin enrolling District residents in a range of health care coverage. The mission of the DCHBX is to improve the health of District residents by creating an organized, transparent marketplace for the purchase of affordable, quality health coverage. In order to ensure successful implementation of this enterprise, details about the Exchange, the Affordable Care Act, and the available insurance options needs to be promoted by a well-designed outreach and communications effort. This effort will be designed in such a way to educate District residents and businesses about their rights and responsibilities under the health care law, the new coverage options available to them, the trained expert assistance available to them, and the ways in which they can enroll in a plan of their choice.

This solicitation focuses on procuring a highly qualified communications, advertising or marketing firm to assist the Exchange in the development and implementation of a comprehensive and effective education, outreach, and communications plan and to promote the health coverage programs and plans that are offered through the HBX.

By serving the nation's capital, the D.C. Health Benefit Exchange has the potential to serve as a model for the country. Thanks to a history of innovative health coverage policies, including a robust Medicaid program such as a Medicaid program, the District of Columbia boasts one of the lowest uninsured rates in the country. Establishment of a well-designed and functioning Health Benefit Exchange is a significant next step in that progress.

For purposes of the marketing, communications and outreach campaign, the target audience has been identified through prior research as follows*:

Uninsured Residents: 7% of 632,000 (approximately 42,000)

Demographic/Segmentation

- o 67% are male; 33% are female*
- o 57.8% are African-American*
- o 20.4% are White*
- o 10.6% are Hispanic*

Geographic Distribution

- o 22.7% are in Ward 1
- o 18.7% are in Ward 4
- o 18.1% are in Ward 7
- o 12.2% are in Ward 5
- o 9.7% are in Ward 2
- o 7.4% are in Ward 3
- o 5.7% are in Ward 8
- o 5.4% are in Ward 6

Individual Policy Owners

- o 22,000 D.C. Residents (3.7%) are covered through direct purchase
- o 14.9% make between 201% to 300% FPL
- o 13.6% make between 301% to 400% FPL
- o 71.5% make at least 401% FPL

Small Businesses (2-50 full-time equivalent employees)

- o There are an estimated 15,000 small businesses in the District of Columbia ranging in size from small “mom and pop” groceries to large restaurants, trade associations, and advocacy organizations
- o Small Business Influencers, including Insurance Producers (Agents and Brokers), Local Chambers of Commerce, Membership and/or Trade Associations
- o Plan Issuers (insurance carriers)
- o Third-Party Administrators (TPAs)
- o Health Care Providers
- o Health Care Systems, Hospitals and Clinics
- o Faith-Based Organizations
- o Not-for-Profit Organizations
- o Community-Based Organizations
- o Patient Advocacy and Consumer Groups
- o Business and Trade Associations
- o Navigators/ Assisters/Caseworkers

**Additional market analysis for audience segmentation is not included in this RFP; the selected Contractor will be expected to utilize existing and available research/data from a variety of sources through the DCHBX, consultants and researchers.*

The following guiding principles have been established during the planning process through formative research:

Guiding Principles of the Communications, Outreach and Education Program:

- ***Bring Everyone Along:*** although not everyone in the District is affected by health reform, every opinion matters. The campaign’s core efforts will focus on enrollment of the key target audiences, while opinion leaders, elected officials, media and the general public must also be educated and their support cultivated
- ***Leverage the Power of Partnerships:*** maximize education and enrollment by leveraging existing resources, networks and channels; identify opportunities for collaboration and partnerships with common visions and missions
- ***Segment Audiences and Customize Communications:*** develop marketing and communications tactics based on research and evidence of how different populations

can best be reached and encouraged to enroll and retain coverage; ensure materials are culturally and linguistically appropriate

- **Educate to Ensure Delivery of the Consumer Experience:** comprehensive information and education is necessary for assisters and partners to provide a seamless consumer experience
- **Evaluate and Adjust Campaign Strategies:** monitor and modify based on feedback from stakeholders, partners, on-going research, program metrics and national indicators.

3.2 Scope of Work

The DCHBX is seeking responses to this RFP from full-service communications agencies to provide the services outlined in the Scope of Work provided below. The DCHBX encourages Offerors to consider establishing strong partnerships with subcontractors that are experts and have experience in specialized areas, in order to ensure that project goals, objectives and deliverables are achieved. While certain services may be provided by the subcontractor(s), the awarded Prime Contractor ultimately will be responsible to ensure that all project goals, objectives and deliverables are met. The DCHBX will hold the Prime Contractor responsible in managing, overseeing, and providing all negotiated services and deliverables.

Offerors are encouraged to recommend and include in their Technical Proposals any other services or recommendations that would increase enrollment in qualified health plans (QHPs) or public assistance programs in the District through December 31, 2014. The communications, marketing and outreach campaign span two open enrollment periods District, including the initial Open Enrollment period (October 1, 2013- March 31, 2014) followed by a second period of enrollment from October 7-December 7, 2014. These additional marketing, advertising and public relations strategies should not only be included in the Technical Proposal, but should also be included in the Cost Proposal. The Offeror must be capable of providing all services proposed immediately following an Award of the Contract.

Offerors should consider the following when addressing the requirements in the Scope of Work:

- Review and Analysis of Existing Information and Data:

The Offeror shall make use of existing research, analyses and reports completed by the DCHBX consultants, other states, the federal government, universities and research firms, foundations, advocacy groups and others that inform the development and design of marketing, outreach and education strategies in the District of Columbia. The Offeror should identify gaps and/or future research or analysis required to develop communications, outreach and education strategies that are not identified in previous reports, surveys, data and/or focus group results. In the event that additional research or analysis is required, the Offeror must provide detailed descriptions and explanations on the types of additional strategies needed.

- Strategies for Promotional Activities and Communication Vehicles:

The Offeror shall assess and recommend different types of promotional strategies and activities for both written and verbal communications for all appropriate target audiences and populations. The Offeror shall, at a minimum:

- Assess cultural and linguistic standards and requirements necessary to conduct effective marketing, outreach and education activities to diverse target populations;
- Assess reading grade level standards required for marketing, outreach and education materials to ensure that communications are easily understood by the targeted audiences;
- Identify, propose and recommend public and private sector partners who will engage and participate in the design and development of the District-wide marketing, outreach and education campaigns;
- Identify the types of communications needed in order to effectively reach the District's diverse populations; including creative sales, outreach and education channels that will be most effective for each target population. Based on the Offeror's strategic recommendations, these may include, but are not limited to, the following:
 - Printed materials such as flyers, brochures, tri-folds, panel cards, palm cards, t-shirts, posters, and bus advertisements;
 - Paid advertising (e.g., radio, television, and newspaper ads);
 - Earned media (e.g., editorials, Op-Eds, stories, interviews)
 - On-line and technology-based advertising, including use of social media;
 - Health provider publications and websites;
 - Partnerships with ethnic media;
- Explore partnerships with various organizations and develop communications strategies accordingly, including but not limited to the following types of organizations:
 - Community-based organizations, non-profit organizations, community service organizations, faith-based organizations, advocacy groups, veterans groups, and senior centers;
 - Advisory Neighborhood Commissions;
 - Health providers, health systems, and hospitals;
 - Business and trade associations;
 - Labor unions;
 - Retail and commercial entities;
 - Public libraries, schools, community colleges and universities;
 - Professional schools and associations located in the District such as medical, nursing, pharmacy and public health;
 - Chambers of Commerce

CATEGORY 1: MARKETING/COMMUNICATIONS STRATEGY SUPPORT

- Assist with the development of communications, outreach and education strategies
- Develop an overall creative approach and theme for the consumer and small business campaigns

- Recommend and perform market research to support comprehensive recommendations and assistance for all aspects of marketing and planning (incorporate existing marketing research and branding to develop strategies)
- Provide account management services including evaluation and metrics, oversight and management of integrated team and subcontractors

Timing	
Plan Development	July 2013
Account Management	Q3 2013- Q4 2014
Creative Planning and Conception	Q3-Q4 2013
Market research	As needed/to be determined
Evaluation	Quarterly

CATEGORY 2: ADVERTISING CREATIVE SERVICES

Develop and execute an advertising campaign targeting the uninsured in the District of Columbia as well as those who influence the uninsured in the District, which may include parents, small business owners, insurance producers, opinion leaders and other residents interested in health care reform. The advertising campaign must include a diverse media mix to reach diverse populations in culturally and linguistically appropriate ways District-wide where people live, work and enjoy recreational activities. Open enrollment begins October 1, 2013 and lasts for 180 days.

Creative: Account management, creative concept development, copywriting, film/video/photography, editing, production of all advertising (TV, radio, online/digital, transit, outdoor and out-of-home, etc., per the approved media plan) translation of print, radio and other media for appropriate multicultural outlets, talent fees, studio expenses, location expenses, voiceovers

- Television: development to include content, editing and recording; various languages and formats
- Radio: development to include content, editing and recording; various languages and formats
- Print media : development to include the design of various formats of print advertisements
- Out-of-home: development to include the design of transit, billboards, athletic venues/stadiums, retail, etc.

The Offeror should conduct up to six (6) focus groups to test marketing and communications strategies to reach the identified target populations in the most effective and cost-efficient manner. At a minimum, the focus groups shall be conducted with small business owners, young adults, and African-American and Hispanic residents of varying income levels. Additional groups will be determined by the COTR. Additionally survey research can be utilized to gauge the public interest in health care options and outreach approaches. The focus group testing process, at a minimum, shall:

- Occur in geographically diverse areas of the City to address the needs of the District's population;
- Solicit input and feedback on the messaging and branding of the DC HBX;
- Solicit input and feedback on effective types of written and verbal communications vehicles and strategies that should be used for marketing, outreach and education campaigns for the target audiences;
- Solicit input and feedback on who would be the most effective messenger(s) to conduct outreach and education to each target population; and
- Solicit input and feedback on creative concepts for the advertising campaign

Timing: Advertising	
Creative Development Begins	Q3 2013
Review/Approval	Q3 2013
Focus Groups	Q3 2013
In Market	Q4 2013

CATEGORY 3: MEDIA PLANNING AND BUYING

The Offeror will research, develop and execute a comprehensive media plan that includes a diverse media mix. The research will include media audience, ratings/readership, value-added opportunities (e.g., on-air interviews, brochure distribution at media events, etc.). The Offeror will conduct the media buy as determined by the COTR. All media markets in the District will be examined for inclusion in the plan.

Proposed recommendations should also include:

- Identification of specific media to be used
- Timing, frequency, penetration and length of placement
- Allocation of placement within selected media
- Justification of media allocation and integration in campaign, cost effectiveness and return on investment
- Itemization of media cost

Timing: Media Planning	
Media Plan completion	July 31, 2013
Media Placement	September 2013-December 2014

CATEGORY 4: PUBLIC RELATIONS

- Develop and execute a public relations plan that parallels the goals and objectives of the integrated marketing campaign
- Provide expert communications counsel including message development, strategic media relations advice and tactical support
- Identify and pursue news and feature placement opportunities, and pitch stories, to all forms of media including print, broadcast and online outlets

- Develop and disseminate press releases in a variety of media outlets including general, ethnic press, trade publications, periodicals, newsletters and certain national publications
- Plan and execute events to launch, roll out and conclude campaigns as appropriate to promote specific milestones such as Open Enrollment, press conferences, etc.
- Provide media relations support including media interview preparation, speaking points, interview facilitation, background research and coordination with partners as necessary
- Recommend and execute additional strategies to achieve communications goals
- Develop press kit materials and maintain current content throughout term of the Contract, including backgrounders, fact sheets, biographies, frequently asked questions, and other materials required to support media outreach efforts

Timing: Public Relations	
Development of Public Relations Plan	July 2013
Execution of Plan	August 2013
Measurement of PR	Quarterly
On-going Execution	On-going through 12/31/2014

CATEGORY 5 ONLINE MARKETING/DIGITAL DESIGN

- Develop and execute a comprehensive search engine marketing (SEM) and search engine optimization strategy (SEO) for [www.DC Health Link.gov](http://www.DCHealthLink.gov)
- Design and produce digital display advertising and promotions for social media sites, mobile, SMS, etc. (text campaigns, push alerts, etc.) and other strategies as recommended
- Conduct testing and readiness activities in support of launching new digital activities
- Provide regular measurement and analysis of SEM/SEO campaign

Timing: Online Marketing Digital Design	
SEM/SEO Plan	Q1 2013
Execution of SEM/SEO	Q3 2013 (late)
Measurement	Quarterly beginning Q3 2013

CATEGORY 6: SOCIAL MEDIA

- Develop an integrated social media plan for DC Health Link designed to create a dialogue with uninsured individuals and influencers in the District about new health insurance options, access points for enrolling in coverage and sharing experiences.
- Recommend platforms suitable for the various target audiences that parallel the integrated marketing campaign;
- Design and maintain branded social media channels, as approved;

- Develop an engagement strategy that includes a plan for cultivating long-term relationships with customers/subscribers and creates a “culture of care” that represents the brand;
- Build an asset library to be utilized across all channels that includes photos, videos, widgets, podcasts, interviews, etc. ;
- Measure and analyze social media program including but not limited to: share of conversation, adjusted engagement levels and level of influence measures;
- Interface with the DCHBX on matters pertaining to customer service;
- Develop a social media policy that includes roles and responsibilities; copyright, confidentiality and fair use laws; response times and customer service standards.

CATEGORY 7: EDUCATION AND OUTREACH—CORPORATE AND COMMUNITY OUTREACH PROGRAMS

Develop an outreach strategy to include a tiered approach to garnering support from retail, sports/recreation, trade, corporations, labor and nonprofit organizations that seeks to reduce the number of uninsured in D.C. through:

- Promotional partnerships that include distribution of branded enrollment kit and materials
- Community outreach events and information sessions
- Promotion of the DCHBX website through partner websites, newsletters, etc.
- Development of collateral materials and in-store promotions
- Partnership programs and education of stakeholders

Corporate Outreach

- Develop a corporate outreach strategy to include a tiered approach to garnering support from retail, sports/recreation, trade associations, corporations, labor and nonprofit organizations that seeks to reduce the number of uninsured in the District through:
 - Promotional partnerships that include distribution of branded enrollment kit and materials
 - Community outreach events and information sessions
 - Promotion of DCHealthLink.gov through partner websites, newsletters, etc.
 - Development of collateral materials and in-store promotions
 - Partnership programs and education of stakeholders

- Design corporate outreach materials for distribution during events, scripts for partners at corporate sites, booth or booths, posters and signage, downloadable templates, etc.

Community and Faith-Based Outreach

- Assemble a comprehensive community outreach plan that incorporates events based on target demographics for the uninsured population
 - Prepare messaging and materials for outreach workers, partners and advocates that can be accessed through the DCHBX website
 - Develop presentations, displays and/or materials to faith-based and community organizations for the purpose of outreach to culturally diverse and hard-to-reach populations
- Develop materials that support outreach to business and civic organizations in culturally diverse communities
- Establish an advocacy plan for minority colleges and universities as well as those with alumni groups for ethnic populations

Timing: Corporate Outreach	
Development of Corporate Outreach Plan	July 2013
Preparations of Corporate Materials	August 2013
Events, Programs and Partnerships	On-going
Timing: Community/Faith-Based Outreach	
Development of Community Outreach Plan	July 2013
Preparation of Community Outreach Materials	July 2013
Events, Programs and Partnerships	On-going

CATEGORY 8: COLLATERAL DEVELOPMENT (PRINTING EXCLUDED FROM SCOPE OF WORK)

- Design a variety of collateral materials to support outreach and education enrollment efforts. The Offeror will be responsible for all aspects of the development and design of the materials used to market wwwDCHealthLink.gov, such as:
 - Provide information designed to educate consumers about health plan options through a series of videos for the consumer-facing website. The videos should be available in both English and Spanish (native language testing required)
- Design materials that support marketing outreach to partners including insurance producers, plan issuers, third-party administrators, such as:
 - Communications tools, materials, and templates including newsletters, brochures, manuals, forms, templates and toolkits
 - Materials will be accessible through the DCHBX’s partner website
- Develop outreach materials to support outreach to hard-to-reach populations in the District, such as:
 - Design template materials for reaching the uninsured population in the District in culturally and linguistically appropriate manner

- Provide materials in a variety of template formats that can be downloaded and printed by community-based organizations
- Create a library of images and archive of materials that allow partners to select materials, customize brochures (postcards or a limited number of template materials)
- Design outreach materials to support the corporate outreach program and community/faith-based outreach programs outlined above
 - Materials should be available in a variety of formats for various audiences to ensure cultural and linguistic appropriateness
 - The plan for collateral materials should take into account accessibility for those with disabilities and offer suggestions for collaboration with other agencies and organizations when possible

3.3 Conflicts of Interest

- A. General. If a conflict of interest arises, the Offeror must be willing to continue to provide service to the DCHBX and be in a position to inform other existing or potential clients that they must find pre- and post-production and purchasing services elsewhere in particular situations. The Contracting Officer reserves the right, in his/her sole discretion, to select another firm to provide service to the DCHBX or to terminate the Contract if a conflict is not resolved to the satisfaction of the DCHBX.
- B. Resolving Conflicts of Interest. The Contractor is required to notify the Contracting Officer immediately of any potential conflicts of interest and to undertake immediate action to eliminate the source of the potential conflict. The Contracting Officer reserves the right to make the Contractor aware of situations that may appear to present a conflict of interest and require the Contractor to promptly remedy the situation. Any request by the Contractor to waive a conflict of interest shall be in writing and shall be submitted to the Contracting Officer. Upon the request of the Contracting Officer, the Contractor will withdraw from providing services to parties whose interests are adverse to the interests of the DCHBX.

3.4 Invoicing and Payment

The contract resulting from this RFP shall be firm fixed price with respect to the services identified in Section 3.2. Within Category 3, the placement/purchase of paid media on behalf of the DCHBX will be at net cost.

- A. All invoices for services shall be signed by the Offeror and submitted to the Contract Monitor no later than the end of the month following the month in which service was provided. Invoices shall include the following information:
 - Contractor name;
 - Remittance address;
 - Federal taxpayer identification;

- Invoice period;
- Invoice date;
- Invoice number;
- Contract number;
- Services provided; and
- Amount due.

Invoices submitted without the required information will not be processed for payment until the Offeror provides the required information.

- B. The DCHBX will make monthly payments to the Contractor for the month covered by the invoice.
- C. The Contractor will provide the Contract Monitor with copies and tear sheets of all print insertions and broadcast orders to accompany media invoices. The Contractor shall execute all contracts with the media and other third parties, including the negotiation of the best possible rates and leveraging of earned media. All such contracts shall be entered into as an independent contractor and not an agent of the DCHBX. All cost benefits must be passed on to the DCHBX. All media costs are net to the DCHBX. The DCHBX shall retain the right to audit the Contractor's books to verify that the DCHBX is receiving all net prices, discounts and rebates.
- D. The Contractor will not receive compensation for miscellaneous services charges, including but not limited to, photocopying, postage, telephone, facsimile, shipping/handling and courier/messenger costs between the Contractor's location and the DCHBX office.
- E. The Contractor will not be reimbursed for travel time or related expenses such as transportation, mileage and parking for meetings with the DCHBX or vendors rendering services on behalf of the DCHBX.
- F. The DCHBX reserves the right to reduce or withhold Contract payment in the event the Offeror does not provide the DCHBX with all required deliverables within the time frame specified in the Contract or in the event that the Offeror otherwise materially breaches the terms and conditions of the Contract until such time as the Offeror brings itself into full compliance with the Contract. Any action on the part of the DCHBX, or dispute of action by the Offeror, shall be in accordance with dispute resolution procedures set forth in Attachment A.
- G. The DCHBX will not withhold federal, District and local taxes and FICA taxes, if any, from payments made pursuant to the Contract.
- H. The Offeror will maintain records evidencing costs and expenses incurred for a period of three (3) years from the date of final payment under the contract.

3.5 Problem Escalation Procedure

- A. The Offeror must provide and maintain a Problem Escalation Procedure for both routine and emergency situations. This Procedure must state how the Offeror will address problem situations as they occur during the performance of the Contract, especially problems that are not resolved to the satisfaction of the DCHBX Contracting Officer within appropriate timeframes.

The Offeror shall provide contact information, as described in 3.5.2, to the Contracting Officer as well as other personnel should the Contracting Officer not be available.

- B. The Offeror must provide a Problem Escalation Procedure no less than 5 days after the Commencement of the Contract (and within 10 days after any change in circumstance which changes the Procedure). The Problem Escalation Procedure shall detail how problems with work under the Contract discovered by the DCHBX will be escalated in order to resolve any issues in a timely manner. Details shall include:

1. The process for establishing the existence of a problem;
2. The maximum duration that a problem may remain unresolved at each level before automatically escalating to a higher level for resolution;
3. Circumstances in which the escalation will occur in less than the normal timeframe;
4. The nature of feedback on resolution progress, including the frequency of feedback;
5. Identification of individuals with their position title and contact information (office phone and/or cell phone number, fax number, email address, etc.) for progressively higher levels that would become involved in resolving a continuing problem;
6. Contact information, as per 3.5.2 (5), for persons responsible for resolving issues after normal business hours (*i.e.*, evenings, weekends, holidays, etc.) and on an emergency basis; and
7. A process for updating and notifying the Contracting Officer of any changes to the Problem Escalation Procedure.

3.6 Insurance Requirement

Pursuant to the terms of the District's Standard Contract Provisions (Section 1.29A), all insurance required by this section shall be effective when the Contract commences and shall remain in effect during the term of the Contract and renewal option periods, if exercised. Certificates of insurance and evidence of the payment of premiums shall be furnished to the Procurement Officer within ten (10) business days after notice of recommended Contract award.

All insurance companies shall be licensed or authorized to do business within the District and shall be subject to approval by Exchange.

The District shall be named as an additional named insured on the policies with the exception of Workers' Compensation Insurance. Certificates of insurance evidencing coverage shall be provided prior to the commencement of any activities in the Contract. All insurance policies shall be endorsed to include a clause that requires that the insurance carrier provide the Contract Monitor, by certified mail, not less than 60 days advance notice of any non-renewal,

cancellation, or expiration. In the event the Contracting Officer receives a notice of non-renewal, the Offeror shall provide the Contracting Officer with an insurance policy from another carrier at least 30 days prior to the expiration of the insurance policy then in effect. All insurance policies shall be with a company licensed by the District to do business and to provide such policies.

3.7 Optional Task Orders

In addition to the services specified in this Scope of Work section, the successful Offeror shall provide additional related out-of-scope services that arise during the term of this Contract, as requested by the Contract Monitor.

- a. Task Orders will govern services required by the DCHBX apart from those specified above. The Task Order process shall apply only to these activities and not for the requirements of Section 3.1 – 3.6 of this RFP.
- b. The Contract Monitor may initiate a Task Order Request for Proposals (TORFP). A TORFP will define the scope and requirements of the specific task(s) to be performed and identify the time for the successful Offeror to submit a proposed response to the TORFP.
- c. Upon receiving the TORFP, the successful Offeror shall provide a proposal in response to the TORFP's requirements. At a minimum, the proposal shall include a proposed approach to satisfying the TORFP's requirements, proposed schedule for completion or implementation, proposed total price.
- d. Upon receipt of a proposal deemed acceptable by the DCHBX in its sole discretion, the Contract Monitor will prepare a Task Order Agreement based on the proposal. The Contractor shall begin work on a Task Order Agreement only upon receipt of a notice to proceed.
- e. Task Order work and invoicing shall be performed by the Contractor in accordance with the terms of the Task Order Agreement.

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SECTION 4 – PROPOSAL FORMAT

4.1 Two Part Submission

Offerors shall submit proposals in separate volumes:

- Volume I – TECHNICAL PROPOSAL
- Volume II – FINANCIAL PROPOSAL

4.2 Proposals

Volume I – Technical Proposal shall be sealed separately from Volume II – Financial Proposal but submitted simultaneously to the Procurement Officer at the address listed on the Key Information Summary. An unbound original, so identified, and six (6) copies of each volume are to be submitted. Two electronic versions of both the Volume I – Technical Proposal in MS Word format and Volume II – Financial Proposal in Excel format shall also be submitted with the unbound originals, technical or financial volumes, as appropriate. Electronic media may be submitted on CD or thumb drive and shall bear a label on the outside containing the RFP title and number, the name of the Offeror, and the volume number (I or II).

A second electronic version of Volume I and Volume II in searchable Word (Version 2007 or newer) format shall be submitted on CD for Public Information Act (PIA) requests. This copy shall be redacted so that confidential and/or proprietary information has been removed (see section 1.21).

All pages of both proposal volumes shall be consecutively numbered from beginning (Page 1) to end (Page “x”).

Proposals and modifications will be shown only to District Government employees, members of the Board of Trustees of the DCHBX, members of the Evaluation Committee, or other persons deemed by the DCHBX to have a legitimate interest in them.

4.3 Submission

Each Offeror is required to submit a separate sealed package for each "Volume", which is to be labeled Volume I – Technical Proposal and Volume II – Financial Proposal. Each sealed package shall bear the RFP title and number, name and address of the Offeror, the volume number (I or II), and the closing date and time for receipt of the proposals on the outside of the package.

4.4 Volume I – Technical Proposal

4.4.1 Transmittal Letter

A transmittal letter shall accompany the Technical Proposal. The transmittal letter does not need to be bound with the technical proposal. The purpose of this letter is to transmit the proposal and acknowledge the receipt of any addenda. The transmittal letter should be brief and signed by an individual who is authorized to commit the Offeror to the services and requirements as stated in this RFP. See Offeror Responsibilities in Section 1.26.

4.4.2 Format of Technical Proposal

Inside a sealed package described in Section 4.2 above, an unbound original, to be so labeled, six (6) copies and two electronic versions shall be provided. Section 3 of this RFP provides requirements and Section 4 provides reply instructions. In addition to the instructions below, the Offeror's Technical Proposal should be organized and numbered in the same order as provided in this RFP.

The Technical Proposal shall include the following sections in this order:

4.4.3 Title and Table of Contents (Maximum One Page)

The Technical Proposal should begin with a title page bearing the name and address of the Offeror and the name and number of this RFP. A table of contents shall follow the title page for the Technical Proposal. **Note: Information which is claimed to be confidential is to be identified after the Title page and before the Table of Contents in the Offeror's Technical Proposal. An explanation for each claim of confidentiality shall be included.**

4.4.4 Executive Summary (Maximum Two Pages)

The proposal must begin with an Executive Summary which clearly and concisely summarizes the contents of the proposal and the marketing services that are being offered to the DCHBX to reduce the number of uninsured in the District through 2014. The Offeror shall clearly demonstrate an understanding of the objectives and goals of the DCHBX in this RFP and an understanding of the Scope of Work. The Executive Summary must clearly state and demonstrate the minimum qualifications as listed in Section 2 on this RFP and also contain a brief synopsis of overall approach recommended by the agency.

If the Offeror is a joint venture, information relating to each joint venture should be provided in this section. The Summary shall also identify any exceptions the Offeror has taken to the requirements of this RFP, the Contract (Attachment A), or any other attachments. Exceptions to terms and conditions may result in having the proposal deemed unacceptable or classified as not reasonably susceptible of being selected for award. If the Offeror has taken no exceptions to the requirements of this RFP, the Executive Summary shall so state.

Following the narrative portion of the Executive Summary, attach documentation to show that the minimum qualifications in RFP Section 2 have been met. See RFP Section 2. If the documentation does not demonstrate that the minimum qualifications are met, or is not submitted, the Offeror's proposal may be deemed not responsible or not reasonably susceptible for award and eliminated from further consideration.

4.4.5 Offeror Technical Response to RFP Requirements

A. The Offeror shall address each section of the Scope of Work and describe how its proposed services will meet the requirements as described in the RFP. Samples of past work to support the recommended strategies should accompany the proposal and be included as an appendix to the proposal. **(Maximum 20 Pages)**

B. The Offeror shall provide a detailed explanation of service capabilities to address each of the following: **(Maximum Five Pages)**

- Describe the Offeror's understanding and knowledge of both the federal and District requirements of the Affordable Care Act as it pertains to a District-based health insurance exchange;

- Describe the Offeror’s understanding and knowledge of the goals and objectives of the District Health Benefit Exchange and the stakeholders involved in the process;
 - Describe the Offeror’s understanding and knowledge of the goals and objectives of the communications and outreach campaign as described in Section 3 of this solicitation;
 - Provide examples of the Offeror’s capabilities, skills, and experience with prior projects in successfully and effectively developing and implementing creative advertising campaigns including television, radio, print, outdoor, mobile, online, and other mediums. Include impact analyses and results as well as examples;
 - Provide examples of the Offeror’s capabilities, skills, and experience with prior projects in successfully and effectively developing and implementing communications and public relations campaigns (e.g., op-eds, news releases, use of social media, news articles, and public service announcements), including impact and results Statements;
 - Provide examples of the Offeror’s capabilities, skills, and experience with prior projects in effectively and successfully developing and designing comprehensive District-wide marketing, outreach and education campaigns for health care, public health or related programs;
 - Describe and provide examples of the Offeror’s knowledge and experience with prior projects involving successful marketing, outreach and education campaigns which targeted diverse, multi-cultural and “hard to reach” populations;
- C. In addition to addressing Section 3 Scope of Work requirements, also provide a detailed implementation plan that clearly demonstrates the Offeror’s ability to meet the DCHBX’s requirements. This implementation plan should include a list of specific implementation tasks and transition protocols, a timetable for initiation and completion of such tasks, beginning with the contract commencement and continuing through the end of the campaign. This plan should address any specific milestones identified in Section 3 and all other tasks and protocols necessary for successful implementation. The implementation plan should be specific about requirements for information transfer as well as any services or assistance required from the DCHBX during implementation. The implementation plan should also specifically identify those individuals, by area of expertise, responsible for key implementation activities and clearly identify their roles for implementation. The plan shall also include a description of how communication is to be accomplished for at-risk and minority populations and for persons with disabilities, including native language testing and development of messaging, strategies and materials that are linguistically and culturally appropriate. **(Maximum Five Pages)**

4.4.6 Offeror Experience and Past Performance (Maximum Four Pages)

A. The Offeror shall describe its overall experience and past performance in providing services similar to those solicited. As part of this, the Offeror shall provide the organization’s legal name and State of incorporation (and headquarters).

B. As part of its offer, each Offeror is to provide a list of all contracts with any entity of the District that it is currently performing or which has been completed within the last five years. For each identified contract the Offeror is to provide in its Technical Proposal:

- The District contracting entity;
- A brief description of the services/goods provided;

- The dollar value of the contract;
- The term of the contract;
- The District employee contact person (name, title, telephone number and e-mail address): and
- Whether the contract was terminated before the end of the term specified in the original contract, including whether any available renewal option was not exercised.

The Procurement Officer, or a designee, will contact the identified District agencies or the most appropriate persons if many contracts are involved, to ascertain the Offeror's level of performance on District contracts. Information obtained regarding the Offeror's level of performance on District contracts will be considered as part of the experience and past performance evaluation criteria of the RFP.

C. As part of its offer, each Offeror is to provide a list of references for which similar services have been provided, in the following categories:

- Three references from current client, with at least one preferably from a government contract; and
- Three references from terminated accounts/clients.

The references shall be structured to permit investigation of the Offeror's prior experience.

Offerors shall list the following information for each of the references submitted:

- Client name and address;
- Name, title and telephone number of person we may contact;
- Description of the work performed;
- Length of time they have been a client; and
- Reason for terminating contract

D. The Offeror shall explain its organization's ownership structure, listing all separate legal entities; identifying all major shareholders/owners (10% or greater ownership); describing how long the current ownership structure has been in place; and noting any changes in ownership structure that have occurred within the last two years. To the extent that such disclosure is not prohibited, please also note any changes in ownership structure anticipated to occur within the next two years.

4.4.7 Samples of Past Work of Similar Scope

The Offeror shall provide at samples of work to demonstrate an understanding of the Scope of Work. Requested samples, per category, including such items as (examples):

- Category 1: Sample status report demonstrating how the agency provides regular status updates to clients
- Category 2: Advertising creative samples shall include television, radio, print and/or online advertising (CD/DVD format or printed)
- Category 4: Press kit samples, press releases, message documents, Op-Ed
- Category 5: Digital advertising, SMS campaign
- Category 6: Social media policy, social media platforms or content strategy
- Category 7: Community or corporate outreach strategy case study
- Category 8: Collateral materials

4.4.8 Staffing Plan, Personnel Qualification and Professional Experience

A. The Offeror shall provide a staffing plan that describes how the Offeror intends to staff this Contract to meet the DCHBX's needs. Provide an organizational chart showing the management structure of the firm with a description of the qualifications, credentials and the location of upper management, regional management and support staff, as well as those actually assigned and dedicated to manage this account. The following information is to be included **(Maximum Two Pages)**

- Names, titles and roles of key personnel
- Area of expertise
- Geographic location
- Brief description of qualification and credentials

B. Key Personnel Resumes: Provide resumes of Account Management/Executive level personnel who will provide the services under this Contract. The resumes should clearly demonstrate that the person possesses the experience and knowledge required to execute the tasks and develop the deliverables specified in the Statement of Work. Each resume should contain the individual's academic and professional achievements, as well as participation and affiliation with any professional organizations **(Maximum Two Pages Each)**

4.4.9 Subcontractors

Offerors shall identify all subcontractors, if any, and the role these subcontractors will have in the performance of the Contract. Please note CBE requirements in Section 1 and Attachment D. Offerors must provide the following for all proposed subcontractors included in the proposal: **(Maximum Two Pages Per Subcontractor, excluding the resume page count—see below)**

- Provide a summary of all subcontractors that the Offeror has partnered with for this Contract. Include the following information on each proposed subcontractor:
- Name and address of the subcontractor and the name, telephone number and e-mail address of the subcontractor's main contact person;
- Complete description of the tasks or projects the subcontractor will perform, or assist in performing, and how the subcontractor will be a benefit and value for the task or project;
- Describe the subcontractor's background and experience, and include resumes of the subcontractor's key staff assigned to the project. Subcontractor's resumes will not be counted towards the maximum number of five (5) pages for this section. Instead, the subcontractor's resumes will be included as Attachments to the Offeror's response to this section. **There is a maximum of two (2) pages for each subcontractor's resume;**
- Estimated cost of each subcontractor for the proposed tasks or projects, based on actual price quotes or negotiations with the proposed subcontractor
- Provide a letter of commitment from each subcontractor specifying the scope of services outlined in the proposal and duration of the commitment

4.4.10 Problem Escalation

In response to RFP Section 3.5, the Offeror must provide a draft procedure that includes, at a minimum, titles of individuals to be contacted by the Contract Manager should problems arise under the Contract and explain how problems with work under the Contract will be escalated in order to resolve any issues in a timely manner. Final procedures must be submitted as indicated in Section 3.5.

4.4.11 Economic Benefit Factors

Offerors shall submit with their proposals narrative describing benefits that will accrue to the District economy as a direct or indirect result of their performance of this contract. Proposals will be evaluated to assess the benefit to District's economy specifically offered.

Proposals that identify specific benefits as being contractually enforceable commitments will be rated more favorably than proposals that do not identify specific benefits as contractual commitments, all other factors being equal.

Offerors shall identify any performance guarantees that will be enforceable by the District if the full level of promised benefit is not achieved during the contract term.

As applicable, for the full duration of the contract, including any renewal period, or until the commitment is satisfied, the Contractor shall provide to the procurement officer, or other designated DCHBX personnel, reports of the actual attainment of each benefit listed in response to this section. These benefit attainment reports shall be provided quarterly, unless elsewhere in these specifications a different reporting frequency is stated.

Please note that in responding to this section, the following do not generally constitute economic benefits to be derived from this Contract:

1. Generic Statements that the District will benefit from the Offeror's superior performance under the contract;
2. Descriptions of the number of Offeror employees located in the District other than those that will be performing work under this Contract; or
3. Tax revenues from District-based employees or locations, other than those that will be performing, or used to perform, work under this Contract.

Discussion of District-based employees or locations may be appropriate if the Offeror makes some projection or guarantee of increased or retained presence based upon being awarded this Contract.

Examples of economic benefits to be derived from a contract may include any of the following. For each factor identified below, identify the specific benefit and contractual commitments and provide a breakdown of expenditures in that category:

- The contract dollars to be recycled into District's economy in support of the Contract, through the use of District subcontractors, suppliers and joint venture partners.

- The number and types of jobs for District residents resulting from the Contract. Indicate job classifications, number of employees in each classification and the aggregate payroll to which the Contractor has committed, including contractual commitments at both prime and, if applicable, subcontract levels.
- Tax revenues to be generated for District and its political subdivisions as a result of the Contract. Indicate tax category (sales taxes, payroll taxes, inventory taxes and estimated personal income taxes for new employees). Provide a forecast of the total tax revenues resulting from the Contract.
- Subcontract dollars committed to District CBEs.
- Other benefits to the District economy which the Offeror promises will result from awarding the Contract to the Offeror, including contractual commitments. Describe the benefit, its value to the District economy, and how it will result from, or because of the Contract award. Offerors may commit to benefits that are not directly attributable to the Contract, but for which the Contract award may serve as a catalyst or impetus.

4.4.12 Litigations/Legal Actions

Describe any litigation and/or government action taken, proposed or pending against your company or any entities of your company during the most recent five years. This information shall include notice whether the Offeror's organization has had its registration and/or certification suspended or revoked in any jurisdiction within the last five years, along with an explanation. In addition, provide a Legal Action Summary. This summary must include:

- A Statement as to whether there are any outstanding legal actions or potential claims against the Offeror and a brief description of any action;
- A brief description of any settled or closed legal actions or claims against the Offeror over the past five (5) years;
- A description of any judgments against the Offeror within the past five (5) years, including the case name, number court, and what the final ruling or determination was from the court; and
- In instances where litigation is on-going and the Offeror has been directed not to disclose information by the court, provide the name of the judge and location of the court.

If an Offeror responds to this section with a generic statement such as, "See 10K" or "See SEC filing":

- The referenced document must be included in the Technical Proposal.
- The location within the document where the requested information can be found should be specifically noted.
- The information contained in the indicated section should be responsive to the information requested under this section. A generic Statement in the document to the effect that there are often what might be called nuisance lawsuits filed against the Offeror will only be sufficient if it is a true Statement. i.e., the Offeror is asserting that in its opinion no lawsuit filed against it is noteworthy.

4.4.13 Terminated Contracts

The Offeror must provide a list of any contracts with any entity, public or private, that have been terminated, for convenience or cause, within the past five years. Terminated contracts for convenience include contracts with renewal options when an available option was not exercised by the contracting entity (customer). For any such instance, identify:

- The contracting entity,
- The nature of the contract,
- The value of the contract,
- The intended original term of the contract,
- At what stage of the contract it was terminated, and
- The reason for the termination

Include a contact person at the contracting entity that can be contacted for verification of the provided information, or for additional information. The contact person information should include the name and title of the contact, along with a phone number and email address.

4.4.14 Financial Capability and Insurance

The Offeror must provide:

- A. Evidence that the Offeror has the financial capacity to provide the service via profit and loss Statements and balance sheets for the last two years.
- B. A copy of the Offeror's current certificates of insurance which, at a minimum, should contain the following:
 - Carrier (name and address)
 - Type of insurance
 - Amount of coverage
 - Period covered by insurance
 - Exclusions

4.5 Volume II – Financial Proposal

Under separate sealed cover from the Technical Proposal and clearly identified with the same information noted on the Technical Proposal, the Offeror must submit an original unbound copy, four (4) bound copies, and two (2) electronic copies (in MS Word format) in a separate envelope labeled as described in Section 4.2, of the Financial Proposal.

The Financial Proposal must contain all cost information in the format specified in Attachment E.

Note: Information which is claimed to be confidential is to be clearly identified in the Offeror's Financial Proposal. An explanation for each claim of confidentiality shall be included.

SECTION 5 – EVALUATION CRITERIA AND SELECTION PROCEDURE

5.1 Evaluation Criteria

Evaluation of the proposals will be performed by a committee established for that purpose and will be based on the criteria set forth below. The DCHBX reserves the right to utilize the services of individuals outside of the established committee for technical advice, as deemed necessary.

5.2 Technical Criteria

Evaluation of proposals will be based on the criteria set forth below. The Contract resulting from this RFP will be awarded to the Offeror that is most advantageous to the DCHBX considering price and the technical factors set forth herein. In making this determination, technical factors will receive greater weight than price factors.

The following are the technical criteria for evaluating the technical proposal in descending order of importance:

- A. **Personnel:** The qualifications, length and relevance of the experience of the Offeror's (and subcontractors') personnel. Relevance will be determined by the alignment of experience with the associated Scope of Work/deliverables of team members.
- B. **Experience of Firm:** The Offeror's documented experience in successfully completing contracts of similar size and scope in relation to the work required by this RFP.
- C. **Comprehensiveness of Proposed Plans:** Soundness of the proposed communications and marketing strategies in meeting the requirements of the Scope of Work. Soundness will be determined by the Offeror's ability to articulate strategic recommendations, tactics and creativity and how the proposed recommendations will reduce the number of uninsured individuals in District, increase enrollment of small businesses and individuals through the District Health Benefit Exchange and improve health and financial literacy.
- D. **Creativity:** Based on samples of the Offeror's work with relevance to the Scope of Work

5.3 Financial Criteria

All qualified Offerors will be ranked from the lowest (most advantageous) to the highest (least advantageous) price based on their total price proposed submitted per the directions in Section 3.4 of this RFP.

5.4 Selection Procedures

5.4.1 General Selection Process

Contracts will be awarded in accordance with the competitive sealed proposals process under the PP&P. The competitive sealed proposals method allows for discussions and revision of proposals during these discussions.

Accordingly, the District may hold discussions with all Offerors judged reasonably susceptible of being selected for award, or potentially so. However, the District also reserves the right to make an award without holding discussions. In either case of holding discussions or not doing so, the District may determine an Offeror to be not responsible and/or an Offeror's proposal to be not reasonably susceptible of being selected for award, at any time after the initial closing date for receipt of proposals and the review of those proposals. If the District finds an Offeror to be not responsible and/or an Offeror's Technical Proposal to be not reasonably susceptible of being selected for award, an Offeror's Financial Proposal will be returned unopened.

5.4.2 Selection Process Sequence

- The first step in the process will be an evaluation for technical merit. During this review, oral presentations and discussions may be held. The purpose of such discussions will be to assure a full understanding of the DCHBX requirements and the Offeror's ability to perform and to facilitate arrival at a Contract that is most advantageous to the DCHBX. For scheduling purposes, Offerors should be prepared to make an oral presentation and participate in discussions within two weeks of the delivery of proposals. The Procurement Officer will contact Qualified Offerors when the schedule is set by the DCHBX and the schedule will be posted to the DCHBX website. **The DCHBX is requesting that Offerors be prepared to make oral presentations during the week of June 17, 2013.**
- Offerors shall confirm in writing any substantive oral clarification of, or change in, their proposals made in the course of discussions. Any such written clarification or change then becomes part of the Offeror's proposal.
- The Financial Proposal of each qualified Offeror will be evaluated separately from the technical evaluation. After a review of the Financial Proposals of qualified Offerors, the Procurement Officer may again conduct discussions to further evaluate the Offeror's entire proposal.
- When in the best interest of the DCHBX, the Procurement Officer may permit Offerors who have submitted acceptable proposals to revise their initial proposals and submit, in writing, best and final offers (BAFOs). However, the DCHBX may make an award without issuing a request for BAFOs.

5.5 Award Determination

Upon completion of all discussions and negotiations, reference checks, and other record communications, and pursuant to the PP&P §IIB and §III, the Procurement Officer will recommend award of the Contract to the responsible Offeror whose proposal is determined to be the most advantageous to the DCHBX considering technical evaluation factors and price factors as set forth in this RFP. In making the most advantageous Offeror determination, technical factors will have greater weight than price factors.

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