

Connecticut Health Insurance Exchange

Consumer Outreach & Engagement

Request for Proposal

(9/18/12)

1.0 Summary

With the passage of the Affordable Care Act (ACA), and Governor Malloy's signing of Public Act 11-53 in July of 2011, Connecticut has been aggressively working on implementing a state based health insurance Exchange. With the receipt of four federal grants totaling \$116 million, efforts are now underway to build out the required functionality across several areas needed to make the Exchange operational, including IT, finance, policy, and consumer assistance and marketing, among others.

As it relates to outreach and engagement efforts, a substantial amount of market research and investigation has been done to gain a firm understanding of several key groups which will impact the overall success of the Exchange. This includes, but is not limited to, key stakeholders such as consumer and business advocates, brokers, providers and carriers as well as consumers and small business owners who are likely to engage with the Exchange and purchase coverage. Building on the knowledge gained, this research is currently being used to develop several key elements of the Exchange's public identity, including potential names for the organization, visual and logo treatments, brand platforms, and messaging recommendations.

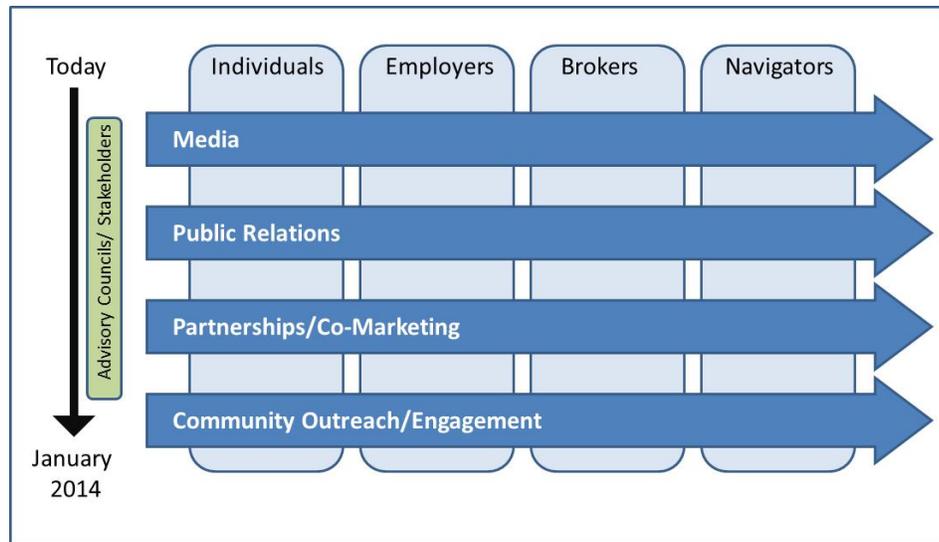
This collective body of work represents the Exchange's "first phase" of marketing and communication development. As the organization looks ahead to the open enrollment period beginning in October of 2013, the Exchange is now focused on the "second phase" of its marketing development. This will consist of both creating and executing a detailed marketing and communication plan for reaching those populations critical to the Exchange's success, and meeting pre-determined goals for enrollment in qualified health plans driven through the Exchange. The plan will include both broad-based outreach and awareness efforts such as TV and radio advertising, in addition to direct marketing outreach and in-person community-level engagement.

This is a historic opportunity to assist the Exchange in building a new, customer-centric health insurance marketplace for the State of Connecticut. To this end, we are looking for a contractor who has superior knowledge and expertise in the field of direct marketing, multi-cultural outreach, partnership marketing, branding, public relations, and event planning, as well as award-winning capabilities in marketing and communications strategy development and implementation.

2.0 Scope of Work

The marketing and communication plan required for the Exchange to successfully meet its objectives will consist of a multi-faceted outreach program. Exhibit 1 below represents a high level view of the primary constituents the Exchange will need to engage, and a preliminary view of the tactics likely needed to reach them. Beginning on the left hand side of the chart, the following work will be required as part of the Exchange's phase 2 marketing development. The proposal submitted will need to address how your organization will approach and deliver on each of the areas listed below specifically.

Exhibit 1:



- 1) Ongoing maintenance of the Exchange's current web site. This site serves as the primary means for the public, stakeholders, board members and advisory groups to access key documents, receive updates and view information about the Exchange. This current site is not the public facing website that will ultimately be used to enroll in qualified health plans, but an organizational website for the Exchange as it currently stands (<http://www.ct.gov/hix>). Ongoing maintenance will consist primarily of content updates (e.g. document uploads, calendar entries, etc.) and not substantial updates to site navigation or functionality.
 - a. As the exchange develops its public facing consumer shopping, eligibility and enrollment portal, the Consumer Outreach and Engagement partner chosen will need to provide consultative services to ensure alignment with brand guidelines, and industry best practices around web communication and design.
 - b. Additionally, an Exchange call center will serve as a primary consumer assistance channel for aiding in eligibility determination and enrollment. The Consumer Outreach and Engagement partner chosen will need to provide consultative services related to call handling procedures, call scripting development, and analysis to determine marketing's impact on call volume and caller profiles.

- 2) Creation and distribution of the Exchange's monthly newsletter. A sample newsletter can be found at the following link. This newsletter will be produced monthly, and distributed to an established subscriber list.
http://www.ct.gov/hix/lib/hix/001896_01_CHIE_exchange_email_links.pdf
- 3) Ongoing maintenance of the Exchange's email distribution list. As the exchange receives additional subscribers (whether directly through the web site, or through other channels), these will need to be added to the list. Conversely, any request for unsubscribing will also need to be managed.
- 4) Ongoing maintenance of the Exchange's Twitter account. This will include the creation of a content calendar, creation of tweets, re-tweets, and monitoring of the Exchange's follower base. Current activity generates approximately 3+ tweets per week.
- 5) Development and execution of targeted marketing and outreach plan for reaching primary constituents: individual consumers, small business owners, brokers, and Navigators. Building on existing research, a plan will need to be developed which contains specific recommendations on all required elements for successful outreach, with the primary goal of driving enrollment in qualified health plans through the Exchange. For each of the four groups listed in Exhibit A this should include, but is not limited to:
 - a. Development and refinement of detailed segmentation models for the current marketplace of uninsured and underinsured CT residents, small business owners, and broker/navigator communities. These models must be research and data derived, and translatable for easy use in DTC (direct to consumer) outreach. This includes list purchasing, predictive modeling development, and individual level response and conversion analysis.
 - b. Development and refinement of tiered messaging recommendation for communicating key points to each of these groups. This includes high level brand platform development and refinement, as well as segmented messaging strategies inclusive of primary messages and support points.
 - c. Development of detailed tactical delivery plan ("media" plan) for reaching these populations, with specific attention to traditional media (TV, radio, internet, etc.) as well as in-person community efforts, social media, and innovative partnership and co-marketing opportunities.
 - In person outreach activities will be conducted via a wide array of volunteers, assisters, Exchange staff, and certified Navigators. The Consumer Outreach and Engagement partner chosen will be responsible for providing design and development support for training programs that may be required, as well as collateral development and delivery.
 - d. Timing of development and deployment recommendations based on beginning outreach in January/February of 2013 through the launch of the open enrollment

period in October 2013, and wrapping up in December of 2013. Specific attention should be paid to the weight and cadence of communications during preliminary educational periods (Jan-Sept) and the open enrollment period (Oct-Dec)

- e. Development of a detailed plan for measuring marketing performance (by tactic, by group, and overall), and schedule for reporting on results.

6) Full public relations support for Exchange, including, but not limited to the following:

- a. Ongoing maintenance and updating of the Exchange's comprehensive press kit (both online and PDF)
- b. Ad-hoc press relations training for key staff members and related personnel.
- c. Press/media tracker: Systematic monthly tracking of media coverage of exchange related topics, both nationally and locally (including the CT Exchange specifically). This also includes production of a monthly report summarizing volume of coverage, tone and topics, and any recommended actions for the Exchange
- d. Active managing of the Exchange's Twitter presence with the media, including the development of a twitter editorial calendar, active re-tweeting, and other tactics to grow follower base
- e. Production of Board and Advisory Committee pre-alters for distribution to the media. These should summarize key issues which will be discussed, and include relevant supporting documentation.
- f. Pro-active outreach strategy for scheduling press interviews and speaking engagements for key Exchange Staff.
- g. Development and distribution of Op-ed responses when required
- h. Distribution of press releases

7) Phase two work will include responsibilities for all production of materials in support of Exchange marketing and communication efforts. This is inclusive of all audio, video, online, mobile and print content, as well as any required elements needed for community related activities (e.g. signage, collateral, shirts, branded transportation, etc.)

8) Phase two work includes responsibilities for any and all media purchasing in support of Exchange marketing and communication efforts. This includes negotiation of media related activity with partner and co-marketing organizations as well (e.g. signs at sporting events, etc)

3.0 Background and Qualifications

Provide a summary of any past projects that would enable you to successfully perform this work. Specifically address experiences you have working in the areas of healthcare and health insurance, as well as any experience supporting, recruiting or engaging intermediaries such as brokers, or community organizations such as health clinics and non-profit organizations. Additionally, please provide any experience you may have (or relationships currently in place) related to addressing populations across a diverse cultural spectrum, and with varying levels of linguistic competency.

Provide an anticipated staffing plan for this engagement, including biographical sketches of staff who will be engaged, their proposed role, their hourly rate, and the amount of time (as a %) they would devote to Exchange account activity.

Lastly, please provide three references for relevant prior work, including name, title, phone, email, and a description of the engagement performed.

4.0 Cost Proposal

Provide a cost summary using the basic template format below. Please provide a detailed narrative that supports these total costs. We recognize there are significant unknowns and that findings from the initial research and planning phases will direct decisions for this engagement and subsequent activity. To that extent, please review and use current research and information available on our web site as you prepare your response.

Additionally, please provide a rate card or approximate hourly rates for other work or services which may arise, but were not detailed or anticipated in the current document.

Estimated Costs by Engagement Area	(\$)
Ongoing Stakeholder Communication (section 1-4 in "Scope of Work" above)	
Development of detailed engagement plan (section 5 in "Scope of Work" above)	
Public relations support (section 6 in "Scope of Work" above)	
Production coordination and media buying services (section 7-8 in "Scope of Work" above) <i>Actual media expenditures (not to be included here) will be negotiated after engagement plan is finalized.</i>	
Total Cost	\$

5.0 RFP Processes

Below please find a schedule of key dates and milestones for this RFP process.

Activity	Date
RFP Issued (open for 30 days)	September 18, 2012
Proposal Due Date	October 17, 2012
Oral Presentations for RFP finalists	October 22-26, 2012
Vendor Award	October 31, 2012

The initial term of the contract shall be from the date specified in the executed contract up until December 31st of 2013. Ninety (90) days prior to the contract expiration, a formal review of work completed will be conducted, with the Exchange having the option to renew the contract for an additional one year period of time each year thereafter.

When preparing your response to this RFP, please adhere to the following list of requirements and guidelines below.

1. The Responder's proposal should consist of the following sections, in the order listed below:
 - a) Cover Letter
 - b) Table of Contents
 - c) Executive Summary
 - d) Organizational Qualifications
 - e) Approach and Methodology To Address Items Detailed In Scope of Work
 - f) Proposed Project Timeline to Meet Key Dates
 - g) Cost/Pricing Proposal
 - h) Biographical Sketches for Key Personnel
 - i) 3 References
2. The proposal should be formatted as follows:
 - Paper size: 8.5 x 11 inches
 - Minimum font size: 11 point (except for footnotes, headers, or footers)
 - Ready for printing: All electronic files submitted will be pre-formatted for printing
 - Software: All electronic files submitted should be created (or fully compatible) with any of the following software suites or packages: Microsoft Office 2003, Adobe PDF.
3. The Responder is required to submit:
 - Ten (10) copies on CD-ROMs which will contain all documents (this is in addition to a submission of a hard copy of the proposal).
 - Six (6) hard copies in binders organized in the order as specified above. Documents will be separated by tabbed dividers within the binder.

The contact person for the purposes of this request is:

Jason Madrak
Director of Consumer Marketing and Outreach
The Connecticut Health Insurance Exchange
450 Capitol Avenue, MS 52 HIE
Hartford, CT 06106-1379
860-418-6349 (Phone)
jason.madrak@ct.gov (Email)

If you are interested in submitting a proposal, it should be sent to the contact above by the deadline of Tuesday, October 17, 2012 by 4:00pm.