SBE 03: Illinois State-Based Marketplace Marketing and Communications Request for Proposals

**Offeror Response Template**

Proposal Cover Sheet

**STATE OF ILLINOIS**

**Department of Insurance**

Request for Proposals (RFP) #: SBE 03― Marketing & Communications

**The Proposal of the Offeror identified below for the above-referenced RFP is submitted electronically and comprises separate files for the technical and cost proposals.**

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| --- | --- | --- |
| **Offeror Information** | | |
| Offeror Name | |  |
| Offeror Mailing Address | |  |
| Offeror Website | |  |
| Offeror Contact Person | |  |
| Offeror Person’s Phone Number | |  |
| Offeror Person’s Facsimile Number | |  |
| Offeror Person’s E-Mail Address | |  |
| Offeror Federal ID Number | |  |
| Offeror Vendor Number | |  |
| **Submittals Enclosed and Separately Sealed** | | |
|  | Technical Proposal | |
|  | Cost Proposal | |

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Printed Name and Title Date

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Signature of an official authorized to bind the Offeror to the provisions contained in the Offeror’s Proposal.

Mandatory Qualifications to Submit an Offer

Fill in responses to the following questions, first replying with “Yes” or “No;” if the answer is “Yes,” provide additional details explaining how the Offeror meets the stated mandatory qualification from RFP Section 1.2:

1. The Offeror must be in operation for at least five to seven years.  Yes  No
   1. When did the Offeror start in business as the entity providing this Offer?
   2. Did the entity have prior names and/or a different structure? If so, list all names and structures and their start and end dates.
   3. Provide a company overview that outlines the Offeror's key competencies and approaches to developing marketing and communications, highlighting relevant projects and campaigns for entities similar in scope, budget, or nature to the SBM.
2. The Offeror must have five to seven years of demonstrated experience in developing and executing successful marketing and communications campaigns relevant to this project's scope of work.  Yes  No
   1. List specific examples of marketing and communications campaigns that are similar in size and scope, such as statewide campaigns targeting diverse populations. Share any experience with healthcare or health insurance campaigns, if applicable.
3. The Offeror must have experience in conducting market research and utilizing data-driven insights to inform marketing strategies.  Yes  No
   1. Describe the Offeror's approach to market research, including methodologies used and how insights are translated into actionable marketing strategies.
4. The Offeror’s Key Staff, collectively across all roles and project phases, must have experience leading and managing large-scale marketing and communication campaigns (“large-scale” is defined as a minimum of a $5M budget).  Yes  No
   1. Concisely list the names of all Key Staff with their role(s), corresponding phase(s), project(s), and overall budget.
5. The Offeror must have a proven track record in creating culturally relevant and engaging content across various media channels. ☐ Yes ☐ No
   1. Showcase examples of the Offeror's creative work, demonstrating their ability to develop content that resonates with diverse audiences.
6. The Offeror must have experience managing paid media campaigns, including media planning, buying, and optimization. ☐ Yes ☐ No
   1. Outline the Offeror's approach to paid media, including their experience with different media channels and ability to maximize ROI.
7. The Offeror must have digital and social media marketing expertise, including strategy development, content creation, and community management. ☐ Yes ☐ No
   1. Detail the Offeror's experience with social media platforms, content creation strategies, and community engagement tactics.
8. The Offeror must be able to provide certified translation services for the top eight languages spoken in Illinois. ☐ Yes ☐ No
   1. Provide information on the Offeror's translation capabilities, including languages offered and certifications held.

Required Forms for Offerors Not Registered in the Illinois Procurement Gateway

Offerors shall complete **Attachment C**, Offeror/Vendor Disclosure Form.

Required Forms for Offerors Registered in the Illinois Procurement Gateway

Offerors shall complete **Attachment D**, IPG Active Registered Offeror/Vendor Form.

Business Enterprise for Minorities, Women, and Persons with Disabilities Act Participation and Utilization Plan

Businesses included in Utilization Plans as meeting Business Enterprise for Minorities, Women, and Persons with Disabilities (BEP) requirements as prime vendors or subcontractors must be certified as BEP vendors before the Offer Opening Date. Go to [*https://cei.illinois.gov/*](https://cei.illinois.gov/) for complete requirements for BEP certification. Go to [*https://ceibep.diversitysoftware.com/*](https://ceibep.diversitysoftware.com/) to search for certified BEP vendors.

Offerors shall complete **Attachment E**, BEP Utilization Plan.

**Technical Proposal**

1. **Technical Proposal Summary**
   1. Provide a concise overview of the Offeror's proposed approach to meet the marketing and communications needs outlined in the RFP.
   2. Describe the offeror’s understanding and knowledge of the Affordable Care Act's federal and state requirements for a state-based health insurance exchange.
   3. Describe the Offeror’s understanding and knowledge of the goals and objectives of the Illinois Health Benefits Exchange and the stakeholders involved in the process.
   4. Highlight the Offeror's unique value proposition and key differentiators.
2. **Marketing and Communications Strategy**
   1. Present a comprehensive marketing and communications strategy that aligns with the RFP's goals and objectives.
   2. Detail the Offeror's approach to developing and implementing a year-round, multi-channel marketing and advertising plan.
   3. Outline strategies to address health insurance disparities and reach diverse target audiences.
   4. Describe the proposed digital communications tool for customer engagement marketing campaigns and its integration with existing systems.
   5. Explain how the Offeror will optimize the marketing budget and maximize ROI.
3. **Market Research**
   1. Describe the Offeror's market research capabilities and methodologies.
   2. Outline the plan for conducting market research to inform marketing strategies and creative development.
   3. Explain how research findings will be utilized to refine marketing efforts.
4. **Creative Services**
   1. Showcase the Offeror's creative expertise and ability to develop compelling content.
   2. Detail the process for creating culturally relevant and engaging content across various media channels.
   3. Address the development of collateral materials and the provision of printing and distribution services.
5. **Advertising Plan**
   1. Present a detailed advertising plan that outlines the tactics and channels to be utilized.
   2. Demonstrate the Offeror's ability to reach diverse audiences and achieve effective reach.
   3. Detail the media buying strategy and approach to campaign execution.
   4. Include specific strategies for paid media, digital, and social media advertising.
6. **Public Relations**
   1. Detail the Offeror's public relations capabilities and strategies.
   2. Outline the approach to building and maintaining a positive image for the Marketplace.
   3. Describe tactics for generating earned media attention and community engagement.
7. **Translation Services**
   1. Provide information on the Offeror's certified translation services and language capabilities.
   2. Outline the process for ensuring accessibility and cultural relevance of marketing materials.
8. **Reporting and Accountability**
   1. Describe the Offeror's approach to reporting and accountability.
   2. Detail the types of reports that will be provided and their frequency.
   3. Explain how the Offeror will track and measure the effectiveness of marketing efforts.
9. **Key Personnel**
   1. Offerors must describe their understanding of the requirements included in Section 8.3, Key Personnel, of the RFP.
   2. Offerors must identify Key Personnel being proposed as part of the RFP response. For each key personnel position, the Offeror must include the name, description of the role and responsibilities, percent of time allocated to the project, experience, and tenure with the Offeror (include **Exhibit 6.8.1** below). Include a brief bio of each Key Person proposed by the Offeror and the location at which that Key Person will perform associated services. Offerors must also include resumes for each Key Person as attachments to the technical proposal.
   3. The Offeror must include an organizational chart comprising all Key Personnel being proposed, as well as all functional entities required to perform the services and fulfill the requirements of the RFP.
   4. Have the Key Personnel identified for this project worked together before on a similar project as envisioned in this RFP? If yes, specify which Key Personnel have worked together before, on what project, and for how long.

**Exhibit 1 Key Personnel (RFP Section 8.3)**

| Name | Project Role and Brief Description | Percentage of Time Allocated to the Project | Years of Experience |
| --- | --- | --- | --- |
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* 1. Per the requirements in Section 8.5, Where Services Are To Be Performed, of the RFP, the Offeror shall disclose all locations where services will be performed by the Offeror and all subcontractors, a description of the services performed in each location, and the known or anticipated percentage of services to be performed at each location. It shall be a breach of contract if the Offeror shifts any such work outside of the United States post-contract execution. Offerors may add additional lines for complete disclosure or provide an attachment in a substantially similar format.
  2. Offerors should proactively identify any missing requirements or constraints that need modification or clarification.
  3. Offerors must demonstrate their ability to support functionalities of the requirements included in Section 8.3, Key Personnel, and Section 8.5, Where Services Are To Be Performed, of the RFP but should not include any associated costs in their cost proposal.

Qualifications

Provide three (3) examples of three different marketing and communications client projects completed in the past five (5) years that showcase the Offeror’s ability to provide similar services outlined in this RFP’s scope of work for private- or public-sector clients. The examples should show how the Offeror used market research to inform the creative strategy of the campaigns. The examples should also show how the offeror monitored and tracked all components of the campaigns and share examples of how this information was reported to past clients. In Exhibit 2 below, please provide the names and contact information of references who can speak to your work on these projects.

1. **Qualifications Showcase**
   1. Example 1
   2. Example 2
   3. Example 3

**Exhibit 2: Qualifications Showcase References**

|  | Organization | Name | Title/Role | Contact Information | Campaign Length |
| --- | --- | --- | --- | --- | --- |
| Showcase 1 |  |  |  |  |  |
| Showcase 2 |  |  |  |  |  |
| Showcase 3 |  |  |  |  |  |

1. **Subcontracting**
   1. Offerors must identify any and all subcontractors that will be performing any service, task, or requirement included in the RFP per the provisions in section 8.4, Subcontracting, of the RFP. If the Offer consists of any subcontractors, then the Offeror shall complete **Attachment C**, Offeror/Vendor Disclosure Form, for each subcontractor.
   2. Offerors shall describe the names and addresses of all authorized subcontractors to be utilized in the performance of this contract, with a description of the work to be performed by subcontractors and the anticipated amount of money each subcontractor is expected to receive pursuant to this contract. The response should include the Subcontractor Name, Anticipated/Estimated Amount to Be Paid, Address, and Work Description.
   3. Offerors must acknowledge understanding and agreement with all subcontractor terms and conditions included in Section 9, Contractual Terms, of the RFP. In their response, offerors should note exceptions to terms in this section and provide a rationale for each exception.
2. **Terms and Conditions Adherence**
   1. Offerors must acknowledge understanding and agreement with all terms and conditions in Section 10, Contractual Terms, of the RFP. Offerors should note exceptions to terms in this section in their response and provide a rationale for each exception.
3. **Timeline, Tasks, and Deliverables**
   1. Offerors must describe their understanding of the requirements and constraints of the RFP in Section 9, Timeline, Tasks, and Deliverables.
   2. Offerors must describe their approach (i.e., “how”) for meeting or exceeding the requirements included in Section 9, Timeline, Tasks, and Deliverables, of the RFP.

**Requirement Exceptions**

If Offerors cannot meet one or more of the stated requirements, Offerors must populate **Exhibit 3** below with their exception(s) to the corresponding requirement(s).

Exhibit 3 Exceptions.

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
| --- | --- | --- | --- |
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