

**Sample
Request for Proposals to Provide
Public Relations, Communications and Media Support for
An Independent Consumer Assistance Program**

The *<Name of Program>* seeks proposals to provide media and public relations support for the Program. This Request for Proposals (RFP) provides project background and describes needed media support and specific tasks to be accomplished by the media contractor. These must be discussed and priced by all respondents according to the instructions given in this RFP.

I. Background

The Program's goals are to be an accessible source of information and help for health care consumers, collect needed information and be an advocate to improve how the health care system works for all managed care consumers. The Program is independent from, but works in close collaboration with, health plans, providers, consumer groups and regulators.

Through hotline and in-person services, the Program assists individuals with general questions about managed care and helps resolve specific problems with managed care plans. Services are delivered primarily by counselors via telephone hotline, with information and advice confirmed by written correspondence and hand-outs. In addition, the Program collects and analyzes information -- generated both by consumers using the Program and from other sources -- that identifies the strengths and weaknesses of particular plans, provider groups or delivery systems. The Program provides feedback based on this information to health plans and providers, and periodically issues public reports.

The Program's primary goals are to: (1) improve access to health care by educating and assisting health plan and insurance enrollees to be responsible, informed and empowered consumers; and (2) improve the health care delivery system by collecting and analyzing information on the types of problems faced by consumers -- and effective solutions -- and providing systemic feedback to health plans, purchasers, regulators and the public.

The startup period for this project is from *<date>* through *<date>*. Following an intensive period of system design, staff recruitment and training, and other preparatory activities, the Program is expected to begin delivering services in *<date>*.

The Public Relations/Communications Contractor will work at the direction of the Project Director. In addition, the Contractor will be expected to work closely with the program staff.

II. General Communications Needs

The Program's communications needs include:

a. Message:

1. A consistent presentation of the Program as independent from health plans and providers. At the same time, the Program must not be seen as adversarial to either health plans or providers.
2. An identity that distinguishes the Program as a resource for consumers with questions or problems to get answers and assistance, while **not** duplicating the functions that health plans' customer services departments can and should play.

b. Product/Delivery Issues:

1. An outreach program that targets different audiences, taking into consideration race/ethnicity, employment status (e.g. employees of small businesses), geography, health/disease status and health plan/provider. The outreach program must serve the initial Program launch and be flexible and adaptable over time to target specific groups based upon the Program's evolving understanding of consumers' needs.
2. Print collateral material which is simply written, low cost, easy and quick to produce, and culturally appropriate for the targeted audiences. The initial print material will include a general flyer on how consumers can access services in the existing system and their rights and responsibilities. Separate flyers will be developed to address high interest concerns (e.g., experimental treatments, chronic care issues, coverage of mental health, existing resources for consumers).
3. Design and implementation of systems that will monitor and measure Program awareness and perceptions among various audiences of its performance/results.

III. Program Audiences

The Program's communications program needs to be developed in the context of a number of distinct audiences. The Program has an Advisory Committee comprised of representatives of the groups that follow which assists in developing its message and program. Some of those audiences, and particular challenges, include:

1. **Individual Consumers:** The Program seeks to educate and assist consumers in managed care throughout the metropolitan area. Managed care consumers are, essentially, **all** consumers. The Pilot Program needs to develop different material for different populations while maintaining a consistent image and message.
2. **Health Plans, Provider Groups and Facilities:** The Program looks forward to working in collaboration with health plans, hospitals and provider groups. The Program anticipates that the majority of consumer contacts will lead to referrals directly to plans' or providers' representatives. The Program will be most effective if it can develop collaborative working relationships with health plans. In many instances, the ombudsman

counselors will reinforce messages from plans or providers. While the Program does not want to be in an adversarial posture with plans, at the same time it will be an advocate for consumers and potentially release reports which contain information which is critical of particular plans or providers.

3. **Individual Providers:** Primary care providers and individual physicians are the primary source of information for most health care consumers.
4. **Regulatory Bodies:** The California Departments of Health Services, Insurance and Managed Health Care (DHS, DOI and DMHC), and the federal Centers for Medicare and Medicaid Services (CMS), each have consumer related functions with which the Program needs to work.
5. **Employers, Purchasing Collectives and Brokers:** Private sector purchasers of health care can serve as a point of assistance for individual consumers. Particularly for large employers or purchasers, employees sometimes turn to human resources departments for assistance. However, beyond the largest employers, many employees do not have any place to turn for assistance. The Program needs to have close working relationships with large and small employers, as well as brokers.

IV. Proposed Public Relations/Communications Services

The Contractor will be selected on the basis of responses to this RFP. The Contractor will serve as a resource on media issues, and assist in the particular tasks described below (within the estimated timeframes). Program staff will be actively involved in media issues but, as described in the Tasks, the Contractor will have lead responsibility for functions detailed.

1. **Image Development & Strategy:** Contractor will help develop the Program's public identity, including its name, standard logo and basic message. Contractor shall conduct necessary focus groups to test names and messages. Develop long-term outreach strategy in consultation with Program staff.
Timeframe: 2-3 months.
2. **Program Launch:** Contractor will coordinate the initial launch for the Program. This shall include:
 - (1) writing media material;
 - (2) planning and implementing a launch event;
 - (3) developing collateral material, including (i) a "basic" brochure on the Program, (ii) a standard format for a series of print pieces on substantive rights and responsibilities issues, and (iii) two or three initial substantive print pieces; and
 - (4) establishing methods for testing future brochures to be developed by the Program.Timeframe: 4 months.
3. **Ongoing Support:** Contractor will provide ongoing strategic support, media release support for periodic reports to be released by the Program, and assist in the

implementation of additional projects as mutually agreed to between Contractor and Program. The Program has not yet determined the nature of scope of services it would require during this period. As detailed in the Instructions which follow, the Program solicits Bidders' suggestions for appropriate services at different levels of resources. Timeframe: 10 months.

V. Instructions for Submission of Proposals

Bidders must submit their proposal no later than 5:00 p.m. on *<date and time>*. Late proposals and proposals delivered by facsimile will not be accepted. Bidders must submit a signed original and 4 copies of their proposal. Proposals should be mailed or delivered to:

The bidder's approach should reflect the needs described in this RFP, which are subject to further development and refinement based on feedback from those who respond to this RFP, as well as the practical experience gained as the Pilot Program evolves.

Please use the following outline to organize your response to this RFP.

- 1. Workplan.** Provide a concise description of how you would accomplish the general tasks described in this RFP.
 - A. Begin with a discussion of how you would propose to address general challenges of addressing (1) the General Communications Needs and (2) the Program's Audiences, as described above.
 - B. Next, describe how you would accomplish each of the specific media/public relations tasks identified in this RFP.
 - Be as specific as possible in your discussion. For example, in describing creation of the appropriate image for the Program, discuss the procedures you will follow, giving details on your specific steps, any sampling, specific procedures for developing and pretesting survey instruments, response rates or groups to be surveyed and the steps you will take to achieve or reach them, how you will analyze the data, and the like.
 - For each task, include a brief discussion about challenges and possible problems you would anticipate, and how you would propose to handle them.
 - For Task 3 (Ongoing Consulting), detail the different levels and types of services you would recommend at the various resource levels described in the "Budget" section. Provide the basis upon which services would be charged and variations to costs depending on whether or not the Program pays a monthly retainer.

- Provide a staffing plan that describes the media/public relations team members and identifies key personnel by name and by role in the project. In particular, describe the qualifications and experience of the person(s) who will provide the technical assistance and expert advice on media/public relations issues, the person who will be responsible for day-to-day administration of the project, and the persons who will have lead responsibility in material development, image, press, and focus groups. Include a cost, time and task matrix that shows estimated total hours of effort for the Project Director, each key staff person, and categories of other staff, and the expense charged for such efforts.
- C. Bidder's Suggestions. Please give your suggestions for better and/or additional ways to address the media/public relations needs set forth for this project which are not otherwise described. Describe advantages and disadvantages of the approaches you recommend, and specify the cost implications, if any.

2. Bidder's Qualifications and Experience

Begin with a brief summary of the Bidder's overall capabilities and experience in media and public relations projects. This summary should briefly describe the Bidder's organizational structure, media experience, cultural/language sensitivity, and its capability to support a community-based communications program.

Next, describe how your organization meets the specific requirements for the media/public relations contractor that are described below. Please be as specific and informative as possible in responding to each point. Include supporting documents (such as sample materials), if any, in an appendix to your proposal.

- A. Substantial experience in marketing, media and/or public relations that is **directly relevant** to the requirements of this project.
- B. Demonstrated knowledge of the metropolitan area.
- C. Demonstrated knowledge and expertise in the research and analytic skills required by this project, including sampling, consumer testing and market research, methodology (surveys, focus groups, individual interviews, use of secondary data), health care and consumer issues.
- D. Demonstrated ability to effectively manage a project of this type.
- E. A track record of on-time performance on jobs of this size and type.
- F. Demonstrated knowledge and expertise in culturally sensitive marketing, including reaching a wide spectrum of demographic groups (such as different racial/ethnic groups; seniors; different income levels),

- G. A description of any special experience, knowledge, or skills that uniquely qualify your organization for this project.
- H. Names, positions, and telephone numbers of five persons who will serve as your references. Please indicate your basis for selecting these particular references; those you select should be able to comment on how your firm has handled projects similar to this one.

3. Budget

The budget available for Tasks 1 and 2 is approximately \$_____.

The budget for Ongoing Support has not yet been determined: please provide options of services that you would recommend at the following three budget levels: (1) \$15,000; (2) \$30,000; and (3) \$45,000 -- all of which are allocated over a 10 month period.

Administrative costs should be estimated (these costs include telephone, postage, travel, shipping, research, etc). Direct printing expenses should not be included in the Bidder's budget. Printing expenses, like any other related costs will be directly born by the Program, should be specifically detailed, with estimates of the amount or range of such potential expenses.

Please summarize your cost estimates in two formats: (1) on a task basis (following the outline of the RFP); and (2) using the Budget Format attached. Hourly rates and fees for professional skills must be broken out; out-of-pocket expenditures or reimbursable costs must be shown.

VII. How Proposals Will Be Evaluated

Proposals will be judged on the basis of overall technical quality and cost. The assessment of technical quality will take into account such factors as understanding of the Program's communications needs and tasks to be performed; technical merit, including clarity and comprehensiveness of the workplan; creativity and added value of the Bidder's suggestions about additional or alternative ways to meet the Programs communications needs; and demonstrated skills, experience, and ability to deliver high quality work on schedule.

All or part of this public relations/communications program may be contracted with a communications firm for implementation. Securing the contract for particular tasks -- specifically Tasks 1 and 2 -- does not guarantee the award of a contract for ongoing services.

VIII. Proposal Submission

Proposals must be received by *<date and Time>* at:

Name
Address

Please Submit _____ copies.

For further information contact _____.