New Mexico Health Insurance Exchange
Advertising, Marketing, Education and Public Relations RFP
Response to Vendor Questions

1.) In addition to the information shared in the RFP, is there any additional research or studies that have been done within New Mexico that you can share? In 2011, several planning grants were issued for targeted populations. See planning grant listed below and at http://www.hsd.state.nm.us/nhcr.

- Spanish Speaking Final report July 2011
- Behavioral Health Final Report September 11, 2011
- Off Reservation Tribal Input Final Report September 2011
- On Reservation Tribal Input Final Report August 2011
- Providers Final Report June 2011
- Sex-Gender Final Report June 2011
- Young Adults and Marginally Employed Final Report June 2011
- General Consumer Final Report June 2011
- APPENDICES for Disability Final Report
- Disability Final Report June 2011
- LGBT Final Report June 2011
- NM Insurance Market Final Report June 2011
- Small Employer Final Report June 2011

2.) In the Technical Proposal section, for 3. Process/Performance (Finalist Presentation), including 3.1 through 3.4, are these to be included in the written proposal? Or wait and be shared during the finalist presentations per the item noted in parenthesis? Your proposal should highlight your capabilities and experience with startups. Section 3.1- 3.4 should be addressed at finalist presentation.

3.) Among Native Americans, is the target urban consumers (not living on the reservation) or those who live on the reservation or both? Both.

4.) When measuring public awareness and perceptions, is the audience New Mexico residents in general or only those who are uninsured? Primarily the audience is the uninsured; our goal is to enroll those eligible for coverage. Our second goal is to provide general exchange education for all New Mexicans.

5.) Are Native American workgroups, key opinion leaders? Can testing be conducted with this group instead of individual Native Americans? Workgroups consist of individuals who have been participating in stakeholder meetings over the last two years. Given our tight time constraints workgroup participants could be used to conduct testing in 2013. For 2014, you should assume that outreach to individual Native Americans will be necessary to greater degree than in 2013. There are three Native American populations, Navajos, Pueblos, and Apache. You should assume there would be testing of each population in 2014.

6.) For section 1.1-1.6, would you like all of this information for each subcontractor? Just wanted to clarify given the page limit. Provide like information for key subcontracts, but no more than 10 additional pages for any subcontractor.

7.) In section 1.9, can you clarify what you mean by professional company references? In addition, would you like references from individual leads from each subcontractor or the team as a whole? And do the references need to be separate or can someone serve as a client and professional reference? For example, if we have three agencies partnering with 10 primary people total, do you need 60 references? Please provide company client references and Key account representative, graphic design, and public relation representative client specific references.

8.) Can we provide an appendix with creative samples or detailed plans, such as proposed media buys? Page limit is increase to 30 pages.

9.) Can you provide information regarding navigators or in-person assisters that will be available for New Mexicans? Assister/ Navigators will be called Healthcare Guides. We expect to have approximately 250-275 guides. For the most part, Guides will come from nonprofits, partnerships and coalitions across the State. The Exchange through your messaging efforts will provide the uniform marketing and educational collateral for New Mexicans.

10.) Are you open to multiple agencies submitting a response as partners? Yes.

11.) Is there a proposed budget or range allotted for this integrated campaign? See NMHIX grant response.

12.) How are you defining “educational content” for the purposes of budget and section 3.3.2? The Exchange is seeking an experienced vendor to produce educational materials in a variety of formats for all audiences interested in getting detailed information about the Exchange, tax credits, the practical impact of healthcare reform on individuals and businesses, and health coverage options in general.

13.) The cover page of Amendment 1 indicates a Submission Date of June 26, 2013. Please confirm this is a typo and that the original Submission Date of July 3, 2013 remains unchanged. This is a typo error, RFP submission due date is July 3rd.

14.) Do you have an ideal budget range for this contract? Do you have an idea of what percentage would be applied to media buys? See NMHIX response to Grant (last page).

15.) Does the State of New Mexico have a target for the percentage of the contact it would like allocated to women/minority-owned historically underutilized businesses? No target has been set, but we would be interested in your Marketing strategies to reach out to small business employer with less than 50 employees, individuals between 138% and 400% FPL, and Native Americans and other targeted populations of underutilized businesses.

16.) Does the Exchange currently have an internal marketing and communication team structure and, if so, will it provide information about the structure and capabilities of this team? We expect to hire an Outreach director by Mid-July 2013. We have minimal structure at the present time. We expect to contract for a communication and marketing oversight services for the first six months. After that we expect to hire a chief communications officer.

17.) Has the Exchange already identified and recruited Assisters/Navigators or are those individuals yet to be identified and/or recruited? An RFP is soon to be released. We anticipate identification of assisters and navigators during the month of July 2013.

18.) Are travel expenses for team members based outside Santa Fe included in the Exchange’s budget? Yes, see response to #53.

19.) Page 10 – Section 2, Insight. Should we describe our approach to implementing the SOW in responding to 2.1 (approach to positioning the Exchange)? Please provide suggested strategies and approach to branding, messaging, and public relations.

20.) Page 10 – Section 3, Process/Performance (Finalist Presentation). Please confirm that this presentation and the sample creative are not required with the proposal submitted on July 3 and are therefore not to be included in the tech proposal page limit. Proposal should highlight your capabilities and resources. Finalist presentation will focus on communication strategies and creativity to create call to action (in our case, enrollment in NMHIX)

21.) Page 11 – The RFP states "The Minimum column represents your best-case, minimum cost scenario, with only high and medium-priority items delivered." Should the contractor identify in the price proposal what activities will be provided for the two scenarios so that the State can compare offers? Agencies may have different opinions of what the high and medium-priority items may be and that could significantly impact pricing. The minimum column should be your company's best case scenario for the activities listed. NMHIX will expect to manage these activities to the best case scenario.

22.) Do you expect specific purchases/buys to be described in the cost proposal, such as media time, publication space, and printing costs? See framework proposed in NMHIX grant response.

23.) As identified on Page 11, paragraph 2b, does this mean the chart below is purely for example labor categories or are these specific categories required by the client and needing a labor rate provided? Should NMHIX need a quote for an ad hoc project or request out of scope services, the labor rates would apply.

24.) With regard to page limits for the technical proposal, does a cover letter and table of contents count against the total page limit? No.

25.) Are personnel resumes, past performance case studies and personal references counted against the technical proposal page limits? No.

26.) Will the finalist presentations be in Albuquerque or Santa Fe? Finalist presentations will be in Albuquerque.

27.) The RFP states that this procurement is not subject to State of New Mexico procurement code, but the terms and conditions state that the contractor will be under audit scrutiny from the State Auditor's office. Please clarify whether this is a State procurement or not? This RFP is not a state procurement.

28.) Is any funding for this effort coming from the state, or is it all dependent on the federal grant application? Federal grants fund all implementation expense except for navigator funding which cannot be paid from grant funds.

29.) Is the $20M applied for in federal grants completely earmarked for this RFP, or are other allied efforts also being funded with this grant? The $20M grant application details that $13.5M for outreach activities and $6.5M for enrollment.

30.) Could the Exchange clarify from Page 10, the amount of Focus Groups projected? Given the amount of time remaining, a minimum number of focus groups will be utilized.

31.) Given the possibility of a time and material contract and load rates are to include travel, should the number of trips be stipulated? See Response to question #53.

32.) Page 11 – Cost Estimate and Not-To Exceed, last sentence – should it read "Not-To Exceed Advertising and Marketing project cost cap?" Yes.

33.) For the anticipated oral presentation, how long will selected finalists have to make their pitch? Is 90 minutes a firm cap? Yes.

34.) For those finalists selected, how many representatives will you allow? Do you prefer a single representative, or one for each subcontractor nominated in a proposal? This decision is left to discretion of bidder.

35.) On page 11, rates are to "apply for work performed in 2013 and 2014" -- is NMHIX wanting a single rate for each category for the entire period of performance, or one rate for calendar year 2013 and another for calendar year 2014? We are requesting a single rate for CY2013 and CY2014.

36.) Does the Exchange plan on having walk-in centers or a mobile van where residents can get answers to their questions about the Exchange and enroll? By state statute, the Exchange will establish one walk in center in Albuquerque and anticipates small walk in center in Santa Fe. We have requested grant funds for mobile vans as part our outreach strategy. See NMHIX response to Grant.

37.) In order to determine the value of importance of the tasks for minimum and not to exceed costs, on pages 12-15, is the order of each deliverable/bullet under the tasks significant? Not particularly, sequence of events list development of messaging, launch, ongoing educational content review, and ongoing public relations efforts.

38.) Scope of Website – page 3 – Last paragraph - Does this contract call for the creation and operation of the business-only (SHOP) website in a way that has no coordination with the federal site for individual sign ups? How will the state work in conjunction with the federal site for the 2013-2014 open enrollment period? We anticipate a front public facing website wired by our system integrator with design, look and feel by vendor. Behind the website, NMHIX will build and maintain SHOP and Feds will operate and maintain individual exchange. Goal is for a seamless as possible experience for the member.

39.) If the contract calls for a state specific website for individual enrollment in 2014, does that mean that there will be one website for both individual and small business or will they be separate sites? One front facing website. Refer to question #38.

40.) Will the winning agency be responsible for implementing the technical side of the site for enrollments, or is the site's purpose primarily educational? No, the winning vendor will not be responsible for the technical side of the site. The site's purpose is to provide New Mexicans a portal for education on the types of plans available in the exchange and related premiums and if applicable advanced premium tax credits.

41.) Enrollment goal - Page 3 – paragraph 5 – is the goal of this education campaign to enroll the estimated 82,557 individuals, or a percentage of that, by the end of 2014? Our goal is to enrolled 100% of projected eligible.

42.) What is the expected total budget for this contract? See NMHIX grant response.

43.) The RFP format calls for tabbed and numbered sections. Would the Board prefer tabs for each individual section (i.e. 1.1, 1.2 etc.) or only tabs to divide the three main sections of the proposal (i.e. 1. Organizational Capabilities/Background 2.Insight 3. Process/Performance, 4. Budget Cost/Proposal)? Please provide tabs for four main RFP sections as indicated above.

44.) As a point of clarification on the technical proposal Section 3.1 (Prepare to bring sample creative: Branding, Messaging and Marketing Strategy), does the Board encourage the submission of sample creative as part of the written technical proposal? Proposal should focus on capabilities, resources, and experience with startups. Creativity should be addressed at finalist presentation.

45.) Pursuant to the standard terms and conditions found in the New Mexico Health Insurance Exchange standard contract, contractors are required to have extensive insurance premiums. The requirement for these levels, are they just for the prime, or must the prime also validate that subcontractors carry the same coverage? Insurance coverage is negotiable.

46.) If we currently represent an existing New Mexico Salud or private insurance provider such as Molina, Lovelace, Presbyterian or BlueCross BlueShield, would this represent a conflict of interest? Disclose relationship and impact on performance.

47.) There are contradictory statements regarding proposal length. In different places it states 25 pages and 30 pages. Can you please clarify? Proposal length should not to exceed 30 pages.

48.) Has the New Mexico Health Insurance Exchange conducted any baseline public awareness and public opinion research? In 2011, several planning grants were issued for targeted populations. See planning grant listed below and at http://www.hsd.state.nm.us/nhcr.

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- Small Employer Final Report June 2011
- Uninsured Survey Final Report June 2011

49.) On page 10 item A.1.10 the rfp references PPACA resources – can you please explain? We are looking for company reference sources and subject matter experts you bring to table.

50.) When preparing the cost estimates for this RFP are you looking for proposed costs for production (shooting television, printing direct mail, etc) and media placement (radio, tv, digital and print buys)? Please clarify. Yes we are looking for production and media placement.

51.) Can you provide us with a budget for paid media placement? See NMHIX grant response.

52.) Under Public Relations budget tasks the RFP requests that the vendor "Develop a Public Relations Strategy, in coordination with engaged Marketing Firm, Outreach Contractors…." We are under the impression that this RFP includes Marketing and the other tasks under this line item. Can you please clarify? Is there another marketing campaign? We are looking for single vendor with capability to perform all required services or a lead vendor with subcontracts who would lead a single coordinated marketing campaign. Should the selected vendor utilize subcontractors, then coordination between the lead vendor and subcontractors would be the responsibility of the lead vendor.

53.) We are instructed to load rates with travel and accommodations costs. Can you give us some idea of the travel requirements of the proposed work? As travel is only likely in a few of the tasks, would it not be more appropriate to enter those travel costs into the appropriate task in lieu of adding them to the hourly rate? We would agree. Travel would be reimbursed separately as requested by NMHIX. All travel cost, mileage and lodging would be reimbursed at State per diem rates.

54.) Under Phase 1, Task 2, Establish a web presence: Please clarify – will the selected firm both graphically design and program the website or just graphically design? Selected firm will be responsible for design elements only. Our systems integrator will be responsible for the hard wire aspects of the SHOP system and the Feds will be responsible for the individual Exchange. We anticipate in October 2013, we will begin work to create a full State Based Exchange.

55.) Are there any limitations to the programming that we need to be aware of? (i.e. Section 508 compliance requirement) 508 and 504 compliance is required.

56.) Please elaborate on "Write and produce introduction-level videos." Do you have an example of the type of video you have in mind? How many videos should we budget for? The following list is intended to provide topics to be discussed; the benefits of having health insurance, how to complete the NMHIX application, how tax credits apply, availability of assisters/navigators and brokers and agents, where to go to get information, open enrollments, Insurance 101, employer responsibilities, employee choice of plans, providers and health plans, defined contributions, open enrollment periods, and employer decision tools. We would expect you-tube type videos. These are separate from TV production commercials.

57.) Is it possible to respond to only the translation portion of the RFP? No, you would need to partner with other firms so as to provide all requested RFP services under a lead vendor.

58.) Will a list of interested bidders/vendors be posted? No.

59.) Can the NM HIX post online (in the form of an addendum) a list of vendors wishing to subcontract specific services as part of the contract? No.

60.) Will localization of the NM HIX Website be included in the project? Yes.

61.) In how many languages must the printed materials be translated? What are the languages? Two languages: English & Spanish. Please discuss your capability to provide printed materials in Navajo.

62.) Will the NM HIX need messages and content written in plain English to comply with the Affordable Care Act? We are requesting that messaging and content be written to a 6th grade reading level.

63.) Do you have a “not to exceed” aggregate budget? See NMHX grant response. This represents the period July 1, 2013 to June 30, 2014. Additional grant funding will be requested for the following year based on results and success over the FY2014.

64.) Can you provide more elaboration on “internal and PPACA resources”? Please describe PPACA resource available to gather educational content and company subject matter experts you bring to the table.

65.) Can you amplify on your creative expectations for the RFP and final presentation? Are you expecting creative samples specific to New Mexico? We are a unique tri-culture state. We are looking for your ideas on how to engage, educate and enroll uninsured New Mexicans. Your should prepare a business and communication strategy to address these objectives.

66.) Is there any negotiability on specific terms of agreement (such as insurance coverage limits/sources)? Insurance terms are negotiable.

67.) Do covers counted as part of the 25 page limit? Tabs? No.

68.) What are you looking for large employer communications to accomplish? No action is required; you keep the health insurance offered by your employer. Large employer may join the exchange in 2016.

69.) How are you defining small employers? Small employer is defined as 50 or less employees.

70.) What is the operational status of your enrollment hotline, and community sign up program? Hotline & community sign up program not yet established. We are establishing these programs during the Month of July 2013.

71.) Will the call center be 24/7? We anticipate call center to be open 7am to 7pm.

72.) Phase 1, Task 2 includes establishing a social media identity. Does this engagement also require the chosen service provider to manage social media communities and platforms throughout the term of the contract? Yes, Social media management and web hits reporting are required.

73.) Can you confirm the written proposal length should not exceed 30 pages (not including Appendix B and Cost Proposal). Proposal should not exceed 30 pages.

74.) Do the tabs and covers fall outside the page count? Yes

75.) In Section 3 of the Proposal Outline (Process/Performance (Finalist Presentation)), it says to "Prepare to bring sample creative...", can you confirm that you are asking that we include the items listed in Section 3 in the written proposal, as well as be prepared to present them should we be selected as a finalist? Vendor should plan to present sample creative materials for NM to finalist presentation.

76.) In Section 1.8 of the Proposal Outline, we want to be sure we understand the subcategories relative to the main question. Are you asking for:

   a. 3 samples of work including results in brand development, campaigns, or other samples,
   b. a description/explanation of our electronic media process and understanding,

c. a description/explanation of our business-to-business and business-to-consumer experience and results delivered, and
d. a description/explanation of our direct marketing experience and results delivered.

Yes. The three samples should demonstrate your brand development cycle, your media execution and rationale, your process to understand the client value proposition, methods you use to produce a high quality and effective consumer experience, and translation of the above into an effective call to action result.

77.) In Section 1.8, can a single sample be defined as a multimedia campaign, which includes multiple, related elements? Yes.

78.) In Section A.1.9. of the Proposal Outline, can you please distinguish between, and define, "professional company references" and "client specific references"? Professional company references are traditional client references. We are also requesting client specific references for key individual account and design representatives dedicate to the NM account.

79.) In Section A.1.9. of the Proposal Outline, are you asking for "Three professional company references" and "3 client specific references" for each proposed lead staff member on the Exchange Account? In other words, if we propose 2 lead staff members, that could be up to 12 total references between the 2? For your example, we would require 3 company references and 3 client specific references for each lead account and design staff members or a total of 6 client specific references.

80.) Will you accept, and apply equal consideration for, proposals for only the PR phase of the RFP? And, will you accept, and apply equal consideration for, proposals that exclude the PR Phase of the RFP? No, we are looking for a vendor capable of performing all services or a lead vendor with subcontractors.

81.) Historically, the term, "creative samples" has been used to refer to either speculative creative for the proposed assignment OR samples of past work. In Section 3.1. of the Proposal Outline, does "sample creative" refer to 1) samples created to address the objectives of this RFP, or 2) samples of previous work? Proposal should include samples of past work. If selected as finalist we would expect speculative creative samples for this assignment.

82.) In Section A.3.3. of the Proposal Outline, the questions in the subcategories (3.3.1., 3.3.2. & 3.3.3.) are not typically subcategories to what is being asked in the main question, 3.3. Rather, the subcategories read more like questions independent of question 3.3. Should we proceed to answer the four questions in section 3.3. as if they are completely separate questions? Yes.