

NMHIX Project Management Services RFP Questions

Section	Question	NMHIX Response
Pg 4, Sec 1.1	Please clarify that June 24, 2015, is the correct due date for electronic submission of proposals.	Proposals are due on Wednesday, June 24, 2015, 3 PM MT.
Pg 6, Sec 1.2	Please clarify what is meant by a "lease option."	<p>Background on Board Actions Regarding Enrollment Technology</p> <ul style="list-style-type: none"> · As a State-Based Exchange, it is up to the Board of Directors to decide what enrollment mechanism will work best to support our mission of expanding access to high-quality and affordable coverage to New Mexicans · In 2013, the New Mexico Exchange Board decided to use the enrollment technology from healthcare.gov to allow for time to build our own technology system. · In July of 2014, the Board voted to wait another year to implement our technology system to allow additional time for testing with the goal of going live in late 2015. · In November of 2014, CMS imposed new requirements for our technology system and did not give us the funding to pay for the required changes · CMS is very impressed with the work that New Mexico has done to establish our State-Based Exchange, including our sustainability plan, governance structure and fantastic enrollment results · In order to determine the best path forward to work toward our mission, BeWellINM spent considerable time evaluating two options: <ul style="list-style-type: none"> o Option 1: Continue to build a CMS compliant technology system and launch it for the 2017 open enrollment period o Option 2: Use the technology from the federal government that is currently working for New Mexico under a fixed lease price <p>Board Decision on a Path Forward</p> <ul style="list-style-type: none"> · After conducting a comprehensive cost-benefit analysis, the Board decided that leasing technology from healthcare.gov while continuing to run all other functions of our State-Based Exchange best supports our mission to expand access to high-quality and affordable insurance to New Mexicans, while keeping cost low. We knew we need to remain flexible, and continuously assess our options to ensure we make the best decisions for New Mexicans. · This path enables us to continue the great work that has been accomplished to date, and supports enhanced focus on our mission. · Our commitment to educating and enrolling New Mexicans into high-quality and affordable coverage remains unchanged. · This path enables us to continue to focus our efforts on continuing the great work that has been done to date in ensuring robust education, outreach, and support for New Mexicans in gaining and maintaining access to affordable health coverage moving forward. · Further this option helps make our long-term operating costs more predictable which likely results in lower long-term costs for health insurance for all New Mexicans. The Board is confident this is the best decision for New Mexicans for our path forward. <p>Cost Benefits</p> <ul style="list-style-type: none"> · We are very fortunate to be in the position that we are in to lease the federal technology, which allows us to take advantage of economies of scale for user experience enhancements · This means a more predictable cost structure over time and avoiding paying for very costly upgrades and statutorily required changes to our own system · Taking advantage of economies of scale and more predictable long-term costs means likely lower assessments on carriers which supports our mission of keeping healthcare affordable for New Mexicans
Pg 6, Sec 1.3	<p>References User Acceptance Testing (UAT) for the Data Management System, however this activity is not referenced in Section 3.0, Scope of Work.</p> <p>Please confirm that PMO services for UAT, post Data Management System procurement by NMHIX, are expected to be part of the Scope of Work for this RFP.</p>	Project Management Services for UAT, post Data Management System procurement by NMHIX, is expected to be part of the Scope of Work.

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Pg 15, Sec 3.1	References "other contractors." Who are the current contractors engaged by NMHIX?	GetInsured (GI) - SHOP Eligibility Technology Vendor ABBA Technologies - NMHIX Internal IT Vendor Bluespire - Website Vendor The Garrity Group - Communications Vendor Please note that these will be the main "contractors", however, there may be others added as necessary based on the needs of the project.
Pg 15, Sec 3.1	Overview – The statement "At the request of NMHIX, the Offeror will develop a Deliverables Expectation Document (DED), for deliverables listed in this Scope of Work". It is unclear to us whether a DED is expected to be included in the proposal response.	Please include as part of the proposal response.
Pg 21, Sec 3.13	Cost Proposal Template: How should we break out hours between the initial contract period and the optional term? Should we provide costs on the assumption that some tasks (e.g., Sections 3.1 through 3.5) will take place during the initial contract term, with the remaining tasks taking place during the optional term, or should all costs be budgeted to occur during the initial contract term?	Assume that all work will be done in 2015. The Optional Term will only be utilized in the event that additional work is required beyond the initial contract term.
Pg 21, Sec 3.13	Optional Support Staff and rate card - We understand the rate card tab of the cost proposal worksheet to include our hourly rates for various technical personnel. We do not understand the intent of the rate card in relation to providing a fixed fee price for that line item on the cost proposal tab as it is not known, at the time of this submission, as to whether any optional support staff will be needed on the project. Can you clarify what you fixed price fee you are expecting to see on 3.13 Optional Staff Support on the cost proposal spreadsheet?	You may indicate a response such as "Provided as needed using staff best suited to scope of work and billed per accompanying Company Rate Card".
Pg 16, Sec 3.2	Does the state anticipate the PMO contractor to provide staff management, allocations and task assignments, for NMHIX staff matrixed to the project?	The project plan should include all tasks and resources, NMHIX and non-NMHIX, required to complete deliverables.
Pg 16, Sec 3.2	How many "requirements projects" does the NMHIX anticipate during the course of the PMO contract?	Requirement gathering will be necessary on all projects listed on the scope of work.
Pg 16, Sec 3.2	Please provide a list of NMHIX affiliated partners or state the number of such partners.	Affiliated partners will include the vendors awarded contracts, CMS, GetInsured, ABBA Technologies, BlueSpire, and The Garrity Group. Please note that these will be the main "partners", however, there may be others added as necessary based on the needs of the project.
Pg 16, Sec 3.2	Does NMHIX use or require any specific tool(s) for the project repository or collaboration sites (e.g., SharePoint)? If yes, which one(s)?	NMHIX uses ShareFile as a project repository.
Pg 16, Sec 3.2	Will NMHIX provide the capability to setup a SharePoint site for storage and access to all project documentation?	NMHIX will discuss this with the company awarded the contract.
Pg 16, Sec 3.2	What does the NMHIX mean by a risk management "tool".	This infers to a documented methodology to track project risks.
Pg 16, Sec 3.2	4 th bullet – As this is a fixed price, deliverables-based contract, why would it be necessary to report the hours worked on the project?	CMS requires that vendors provide detailed information regarding resources, hours, and tasks for audit purposes, even for fixed priced contracts.
Pg 17, Sec 3.3	In Section 3.3, includes the requirement: "the Offer or is requested to prepare a Project Plan, Complete Planning Expectations, Activities, and Guidelines that will include a Security & Privacy Management Plan." Is it expected for the PMO vendor to be responsible for creating the Security & Privacy Management Plan?	The Project Management Service vendor will be responsible for developing, with the vendors and NMHIX, a security and privacy management plan for SHOP Enhancements, the Data Management System, and any other Consumer Support projects that may include consumer personal identifiable informaton (PII).
Pg 17, Sec 3.3	Within what timeframe, during the first 30 days. Does NMHIX expect to receive the DED for the Project Plan?	The DED should be received by NMHIX within 2 weeks of the start date.
Pg 20, Sec 3.7	Please provide a list of vendors to be managed, or the number of them.	The vendors themselves will not be managed, rather, their tasks, deliverables, and associated project resources will be managed. Those vendors include: Data Management System Vendor (TBD), IV&V Services Vendor (TBD), Get Insured (specific to SHOP Enhancements), and up to 3 vendors procured for Consumer Support projects.
Pg 6, Sec 1.3	Is the PM Services vendor providing the following functions for their own team only, or for the entire project including the Solution Vendor, NMHIX itself, and other vendors? <ul style="list-style-type: none">• Blueprint updates for CMS approval	NM Blueprint updates will be made as necessary for NMHIX to ensure the Blueprint is current. If information specific to any item on the Scope of Work is required on the Blueprint, that information will also be included.
Pg 6 Sec 1.3	Is the PM Services vendor providing the following functions for their own team only, or for the entire project including the Solution Vendor, NMHIX itself, and other vendors? <ul style="list-style-type: none">* Disaster Recovery Plan / Business Continuity Plan	The Disaster Recovery/Business Continuity Plan is for NMHIX, however, there may be our internal system vendor, ABBA Technologies, GetInsured, and possibly some of our other vendors based on Business Contnuity needs.

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Pg 14, Sec 2.25	Since NMNIX has chosen to directly lease Federal Marketplace technology for the individual exchange, are existing technology vendors related to NM SHOP or the leased Federal technology platform precluded from participating in Project Management oversight and direct vendor management role due to conflict of interest?	Neither GetInsured or CMS (Federal Platform) have expressed any interest in providing Project Management Services.
Pg 15, Sec 3.1 Pg 19, Sec 3.6	Section 3.1, includes the requirement for the Offer or to: "Build and maintain information access, integration and reporting capabilities." Section 3.6, includes the requirement: "The Offer or will be asked to support procurement for Data Management Reporting System, ..." Please clarify what specific "Data Management Reporting System" assets and/or services are anticipated to be purchased under the RFP referenced in Section 3.6, and how these procured assets and/or services relate to the requirement in Section 3.1 quoted in the first sentence above.	The requirement in Section 3.1 - "Build and maintain information access, integration, and reporting capabilities" refers to Project Management related information integration and reporting. Section 3.6 - "The Offeror will be asked to support Data Management Reporting System..." refers to services that require procurement to design, develop, and implement a system that will house FFM information from CMS.
Pg 16, Sec 3.2	Is the PM Services vendor providing the following functions for their own team only, or for the entire project including the Solution Vendor, NMHIX itself, and other vendors? * Configuration management Plan and execution; document traceability; and version control	The PM Services Vendor will provide this for the entire project.
Pg 18, Sec 3.4.2	Please provide a list of workgroups, or the number of them, to be facilitated.	The workgroups required will be determined based on business requirements and various needs of the project.
Pg 18, Sec 3.5.1	Does NMHIX have a preference about the frequency of releases expected for SHOP (e.g., quarterly, bi-annually)?	GetInsured (GI) advises NMHIX of upcoming releases. Timing may be discussed upon commencement of work.
Pg 18, Sec 3.5.1	Can NMHIX provide a list of systems and projects that will be in scope for the Requirements Traceability Matrix (RTM)? Based on our understanding, the SHOP technical solution, the Data Management Solution, and requirements from any additional procurements for Customer Support will be in scope. Can NMHIX also confirm that a RTM is no longer required to track elements related to the Individual Exchange technical solution?	In addition to the items listed on your question, RTM will be required for Individual Wind Down Support, the FFM Lease Option implementation, Disaster Recovery/Business Continuity Plan Development, and other items listed on the scope of work as necessary.
Pg 19, Sec 3.5.2	Is the PM Services vendor providing the following functions for their own team only, or for the entire project including the Solution Vendor, NMHIX itself, and other vendors? * Requirements Management and Requirements Development Plans and execution, including requirements traceability matrix	The PM Services Vendor will provide this for the entire project.
Pg 19, Sec 3.5.3	Is the PM Services UAT scope limited to assist in development and monitoring of UAT (Section 3.5.3 on pg. 19), or to lead and manage the UAT?	For 3.5.5, the UAT scope is for development of test cases and UAT monitoring.
Pg 20, Sec 3.9.1	Page 20, Section 3.9.1: To help proposers with accurately scoping the work, can NMHIX provide information on the extent to which business processes, workflows, and policies and procedures are currently documented?	NMHIX currently has policy and procedures and business processes in place for Finance, Compliance, SHOP, and IT. All processes need to be inventoried, reviewed and potentially updated. There may also be additional policies and processes that require development in these and other areas of NMHIX. Processes will also need to be identified for development related to SHOP Enhancements and the Data Management Reporting System. There are approximately 10 findings from recent audits that will require follow-up to ensure that policies/processes have or will be documented. Other audits are currently in progress for which no information is yet available.
Pg 20, Sec 3.9.1	Please provide a list of processes to be audited/inventoried under Vendor Management, or a number of how many there are.	NMHIX currently has policy and procedures and business processes in place for Finance, Compliance, SHOP, and IT. All processes need to be inventoried, reviewed and potentially updated. There may also be additional policies and processes that require development in these and other areas of NMHIX. Processes will also need to be identified for development related to SHOP Enhancements and the Data Management Reporting System. There are approximately 10 findings from recent audits that will require follow-up to ensure that policies/processes have or will be documented. Other audits are currently in progress for which no information is yet available.

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Pg 20, Sec 3.9.1	Would NMHIX be willing to provide a list of how many and what business processes, workflows and policies and procedures they have already developed? This would be helpful in quantifying the level of effort for this task.	<p>NMHIX currently has policy and procedures and business processes in place for Finance, Compliance, SHOP, and IT. All processes need to be inventoried, reviewed and potentially updated. There may also be additional policies and processes that require development in these and other areas of NMHIX. Processes will also need to be identified for development related to SHOP Enhancements and the Data Management Reporting System.</p> <p>There are approximately 10 findings from recent audits that will require follow-up to ensure that policies/processes have or will be documented. Other audits are currently in progress for which no information is yet available.</p>
Pg 20, Sec 3.9.1	Could NMHIX share the result of the "recent, independent financial, and state-level audit activities" for the findings that are not confidential? This would be helpful in quantifying the level of effort for this task.	<p>NMHIX currently has policy and procedures and business processes in place for Finance, Compliance, SHOP, and IT. All processes need to be inventoried, reviewed and potentially updated. There may also be additional policies and processes that require development in these and other areas of NMHIX. Processes will also need to be identified for development related to SHOP Enhancements and the Data Management Reporting System</p> <p>There are approximately 10 findings from recent audits that will require follow-up to ensure that policies/processes have or will be documented. Other audits are currently in progress for which no information is yet available.</p>
Pg 24, Sec 4.1.6	NMHIX requests a detailed timeline for key milestones for the initial contract term scope of work and any additional contract periods covered by an extension. Given the number of dependencies, including number of vendors to be managed, coordination with other State agencies and the lack of information related to the schedule contained in the RFP, to what level of a detailed timeline is NMHIX seeking?	Key milestones should be set based on the information provided in the scope of work.
Pg 24, Sec 4.1.7	Taxes – In our experience with the State contracts, New Mexico Gross Receipts Taxes are included as separate line items in New Mexico IT contracts. Is the contractor required to include New Mexico GRT in the price of the deliverables?	New Mexico Gross Receipts Tax should be included in the pricing of deliverables.
Pg 24, Sec 4.1.7	Does NMHIX allocate its budget based on calendar year or state fiscal year? For example, does the budget allocated for services such for 2015 end in December?	NMHIX's budget is allocated through December 31, 2015.
General	NMHIX issued an RFP for Project Management Services in December 2014. Was an award made for that procurement? If so, to whom, and was a contract executed?	The Project Management Services RFP from December 2014 was not awarded to any vendor.
General	Given the size and scope of the requested services, would NMHIX consider extending the due date to allow proposers additional time to form a team and prepare a response?	NMHIX will not extend the due date at this time.
General	Will losing vendors who bid the PM Services, subsequently have the opportunity to bid the NMHIX IV&V effort?	Yes
General	Please confirm that the electronic version is due Wednesday June 24 at 3pm MT.	The electronic version is due on Wednesday, June 24, 2015. NMHIX apologizes for the misprint in the 2nd statement below the "Key Dates" table.
General	We find no reference to the Department of Information Technology (DOIT) or the Project Certification Committee (PCC) in the RFP. Does NMHIX IT projects fall under those processes/agencies?	NMHIX does not have affiliation with the New Mexico Department of Information Technology or the Project Certification Committee at this time.
General	Is the work to be performed in Santa Fe or Albuquerque, NM?	Albuquerque, New Mexico
General	Is there a possibility of extending the submission date beyond June 24, 2015?	NMHIX will not extend the due date at this time.
General	There is a discrepancy in the key date table and the narrative which follows. The table states, Submission of Proposal Electronically by Email to RFP@nmhix.com (3 pm MT) Wednesday, June 24, 2015, 3 PM MT. The narrative states, Offerors shall submit an electronic copy of proposals and price proposal on Tuesday, June 23, 2015 at 3 pm MT to RFP@NMHIX.com. Please confirm the electronic copy is due Wednesday, June 24 th .	The electronic version is due on Wednesday, June 24, 2015. NMHIX apologizes for the misprint in the 2nd statement below the "Key Dates" table.
General	Will NM Health Insurance Exchange consider extending the due dates for electronic and hard copies of the vendor response?	NMHIX will not extend the due date at this time.

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General	Within the scope of work, there are number of initiatives which the selected PMS vendor is asked to manage, coordinate and provide oversight of other project stakeholders (includes other vendors) and their assigned deliverables. Given that various stakeholders are tasked with delivering their respective scope, who is ultimately responsible for the success of the various initiatives? In addition, who is liable if the initiatives are unsuccessful?	Each vendor will be responsible for their deliverables. The Project Management Services vendor will be responsible to ensure that, for each initiative, all tasks are adequately documented, progress is monitored and tracked, and that issues and risks are communicated to NMHIX Leadership and the Board of Directors.
General	Can the vendor that is awarded the Project Management Services contract also be awarded the anticipated Data Management Systems contract (advanced analytics and reporting)?	No, the vendor that is awarded the Project Management Services contract may not be considered for the Data Management System contract. Since the PMS vendor will be involved in the procurement process, it would be considered a conflict of interest.
General	Will the awarded Project Management Services vendor be interacting with HSD in any manner that may disqualify them from bidding on the anticipated HSD MMIS Replacement or Medicaid and/or Eligibility Call Center RFPs?	The Project Services Management vendor will be expected to interact with HSD periodically. NMHIX is not familiar with the HSD procurement that is referred to here and cannot say whether work for the NMHIX would disqualify the vendor from participating in the HSD procurement.
Pg 17-18, Sec 3.4.1 & 3.4.2	Can some sense of the required in person/onsite meeting elements be provided? We understand some travel will be needed and we will provide those costs in our proposal, but we would like to understand better the degree of what you are expecting. An example requirement where the NMHIX may expect onsite participation with respect to "3.4.1 Manage Project Reporting for Internal and External Stakeholders" and "3.4.2 Facilitate Workgroups" on Page 17-18 of the RFP. We are adept at managing these types of sessions remotely or in person.	NMHIX will require that a designated Project Management Lead be present @ 80% of the work week. Other Project Management resources' on-site time will vary based on the needs of the projects, however, NMHIX will make every effort to allow those resources to work remotely as much as possible.
Pg 18, Sec 3.4.2	Can NMHIX provide an estimate for the number of workgroup sessions to be facilitated during the first 6 months term and the remaining optional 1 year term? ("3.4.2 Facilitate Workgroups" on page 18 of the RFP)	The workgroups required will be determined based on business requirements and various needs of the project.
Pg 18, Sec 3.5.1	Can NMHIX please clarify the NMHIX guidelines for "...the elicitation, development and documentation of requirements..." (Section 3.5.1 Track and Manage Requirements on Page 18 of the RFP)? Are there particular software tools that NMHIX requires the vendor to use?	The vendor should utilize Microsoft Office tools to document all project-related items.
Pg 18-19, Sec 3.5	Can NMHIX provide an overall project management plan/timeline/strategy for what the Exchange is looking to accomplish over the next 12 months? As example, it is not clear from reading the RFP if SHOP is going live with enhancements for the Plan Year 2016 (3.5 Requirements Management on Page 18-19)? We would expect that to be the case, but some sense of the timeline and major milestones around this effort and others would be beneficial to help craft a comprehensive response.	NMHIX's goal is to have SHOP Enhancements in production in time for 2016 Open Enrollment. The target date for all other initiatives is 12/31/2015, however, if additional Consumer Support tools are procured, those may have an earlier target date in line with SHOP Enhancements.
Pg 16, Sec 3.2	Section 3.2 requires on Page 16 of the RFP "...a complete electronic project document library and implement...". Does the NMHIX have any preference for the tools to be provided and the way they are provided? Is the agency willing to have a cloud hosted offering or does it require these tools to be on internal resources? If internal, should the we provide costs for hardware and installation services?	NMHIX uses ShareFile as a project repository.
Pg 34, Sec 19 B	Section 19 B on page 34 of the sample contract states "Contractor shall contract for any required independent audits, including but not limited to audits pursuant to OMB Circulars A-21, A-87, A-110, A-122, and A-133, if applicable". The OMB Circulars referenced are for educational institutions; state, local, and Indian tribe governments; and non-profit organizations, are there any required independent audits for Vendors that do not fall into any the referenced organization types?	The audits listed are the standard CMS-required audits. Though NMHIX does not anticipate audits outside of those listed, there may be instances of audits requested at the state level such as the Legislative Finance Committee (as an example).
Pg 4, Sec 1.1	Electronic delivery of the proposal: The RFP states both June 24th by 3PM Mountain (cover page and table 1.1 Key Dates and in section 5) and June 23rd (Page 4 of the RFP "Offerors shall submit an electronic copy of proposals and price proposal on Tuesday, June 23, 2015 at 3 pm MT to RFP@NMHIX.com."). Can this be clarified as to which date is correct?	Proposals are due on Wednesday, June 24, 2015, 3 PM MT.

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