



NEW MEXICO HEALTH INSURANCE EXCHANGE (NMHIX)
REQUEST FOR PROPOSALS FOR

Health Insurance Exchange Marketing, Media and Communications

RFP No. 2014/004

**RFP Issued:
September 17, 2014**

**Proposals Due:
October 8th, 2014
12 P.M. Mountain Time**

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1: Introduction

1.1 Key Dates

EVENT	DATE
RFP Announcement	September 17, 2014
Telephonic Bidder's Conference	September 22, 2014 10:00-11:00 A.M. Mountain Time Call in - 888.537.7715 Participant code - 69281231#
Deadline for Written Questions from Offerors	September 23, 2014 5 P.M. Mountain Time
NMHIX to Provide Answers to Written Questions from Offerors	September 25, 2014
Mandatory Bidder's Intent to Bid Received	September 26, 2014 3 P.M. Mountain Time
Proposals Due	October 8, 2014 12 P.M. Mountain Time
Possible Interviews and/or Presentations	October 14 - 15, 2014
Evaluation Committee Selects Preferred Bidder(s)	October 17, 2014
Contract Review and Negotiations	October 17 - 24, 2014
Contract Signing	October 27, 2014

1.2 Background on the New Mexico Health Insurance Exchange

The New Mexico Legislature passed SB 221 and 589 as amended, the “New Mexico Health Insurance Exchange Act,” (the “Act”) during the 2013 Regular Session, and Governor Suzanna Martinez signed the Act on March 28, 2013. The New Mexico Health Insurance Exchange (“NMHIX”) is created as a nonprofit public corporation (501c4).

Our mission is to provide qualified individuals and employers with increased access to health insurance in New Mexico. Our vision is to improve the quality of life for New Mexicans, especially when it comes to their health, their access to health care providers, and their financial security. The Exchange is governed by a 13-member board of directors that was appointed in April 2013. Since then the board has made the following decisions:

- The Exchange will operate a Hybrid model in 2014 and 2015, and will become a State based Exchange in 2016;
- The Exchange will create the SHOP for small business and will use the Federal platform to enroll individuals until the Exchange system is ready to enroll individual consumers in 2016.

Uninsured Population Prior to ACA	440,000 (21.6%)
New Medicaid Enrollees	-140,000
NMHIX enrollment (34,200) (est. 50% had prior coverage)	-17,100
Current estimate of uninsured	282,900 (14.5%)

It is projected that Medicaid may add another 40,000 – 45,000 enrollees by the end of 2015 and NMHIX may add another 40,000 individuals after the second enrollment period of Nov 15, 2014 to Feb. 15, 2015.

Current Uninsured Population	282,900
Less additional Medicaid/NMHIX	-85,000
Projected Uninsured Spring 2015	197,900 (9.6%)

In order to identify lessons learned from the initial open enrollment period the NMHIX procured the services of Research and Polling, Inc. to provide a report on the effectiveness of the marketing and outreach campaigns. After submitting the Mandatory Intent to Bid, Bidding Vendors will sign a NMHIX-provided Non-Disclosure Agreement, and can receive the full Research and Polling, Inc. report, including data compiled during the study. This information is vital to understanding the approach needed for a successful open enrollment period for 2014-2015. This report is called *Attachment A Polling Uninsured Data* and will be delivered under a separate cover, with additional background documents, after signing the Non-Disclosure Agreement.

The goal of this RFP is to procure vendor(s) that will assist the NMHIX in significantly increasing QHP enrollment during the 2015 / 2016 Open Enrollment Periods (November 16 through approximately February 20, 2016) and continue outreach and enrollment efforts throughout the year scaled to needs.

1.3 Purpose of This RFP

The purpose of this Request for Proposals (“RFP”) is to select one or more vendors to provide the services requested in the four different tracks. The tracks are:

Track #	1	2	3	4
Track	Marketing Campaign	Communications and Outreach	Website	Evaluation and Research
Tasks	Coordination of all Tracks across all vendors and functions	Integrated Strategy for Communications and Outreach	Website Redesign in English and Spanish (based on Branding)	Evaluation of all Marketing and Communication Strategies
	Develop and manage an Integrated Strategy (re-branding across all channels and platforms, Campaign Development and Management)	Media Relations (including press releases, media relationships, interviews and coordination, crisis management, regular media monitoring - daily news scans, nationally and NM)	Manage Website and Infrastructure	Real-time evaluation and recommendations to recalibrate approaches
	Paid Media and Earned Media (TV, Radio, Print, Outdoor, etc.)	Outreach Partner and Event Support (including developing presentations, presentation support, media promotion of events, etc.)	Innovative ideas to expand uses of technology	Include proposed preliminary strategic plan
	Educational and Promotional Materials, including NM Print Vendor	Implement and Manage Social Media Campaign and Provide Support	Include proposed preliminary strategic plan	Cost Proposal
	Design social media campaign	Align NMHIX messaging with outreach partners, training, external and internal communications (including development of FAQs and other tools)		
	Assessment and Data-Driven Recommendations of Alternative Strategies, including mobile tours	Draft Annual Report, per the direction of the NMHIX		
	Development of on-going Sustainable Marketing Plan and Strategies	Include proposed preliminary strategic plan		
	Include Proposed Preliminary Strategic Plan			

As shown above, the NMHIX has organized this RFP into four main “Tracks” of work it would like to procure. This RFP contains specific statements of work for each Track, found in the Scope of Work section of this RFP.

Vendors are welcome to bid on just one track, or on multiple tracks. No preference will be given to vendors that bid more tracks. The NMHIX is looking for the most qualified vendor with the best ideas to fulfill the requirements of each Track.

The NMHIX is looking for the Marketing Campaign vendor to lead the coordination among the vendors for all Tracks. In doing this the NMHIX acknowledges the importance of integrating the re-branding and re-messaging efforts across all functional areas of its consumer outreach and engagement efforts. Per the requirements outlined in this RFP, the Marketing Campaign vendor will provide a dedicated Project Manager who will have the responsibility of organizing the direction and efforts of the Communications and Outreach vendor, the website vendor, and the Evaluation and Research vendor. The goal is to ensure that a unified voice and message is found in all internal and external communications during the open enrollment periods.

Potential vendors are asked to hold October 14th and October 15th open for potential onsite presentations and to present best and final offers to the NHHIX. The NMHIX will alert vendors of the final dates and arrangements as soon as possible.

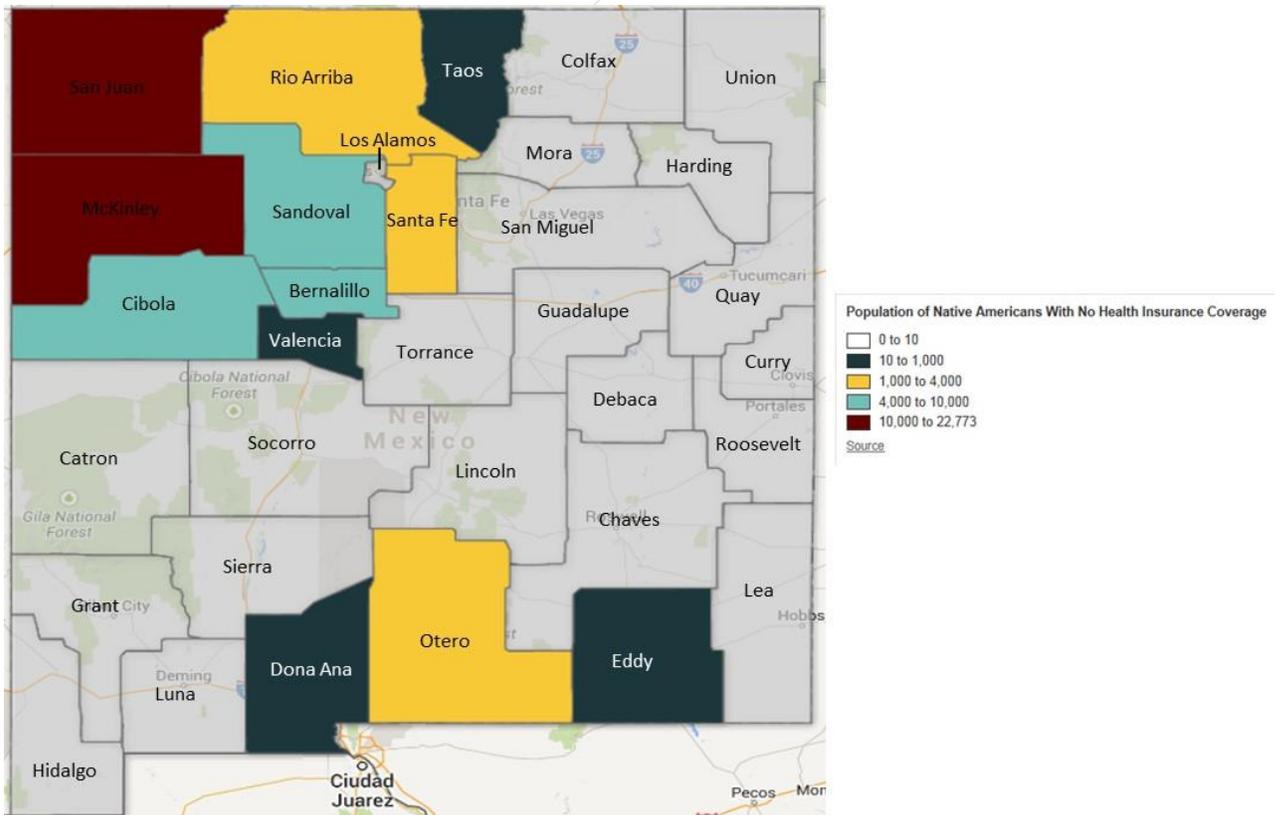
Contractors will be asked to begin working immediately after signing a contract. Additionally, a work plan for each Track will be required five (5) calendar days upon signing the contract.

1.4 The Uninsured and NMHIX Enrollment Projections

Target Population for Qualified Health Plan Enrollment			
County	Total Pop 18 to 64	Uninsured Age 18 to 64	Unins Above 138% Poverty
	1,244,886	345,794	187,674
Bernalillo	416,407	101,334	57,756
Dona Ana	124,515	41,161	18,805
Santa Fe	90,327	24,169	14,124
Sandoval	80,803	17,610	10,856
San Juan	78,322	28,468	16,388
Valencia	45,415	12,673	7,014
McKinley	43,086	17,671	8,756
Lea	36,972	11,526	6,259
Chaves	36,854	10,940	5,466
Otero	36,815	11,202	5,989
Eddy	31,960	7,207	4,022
Curry	28,745	8,091	4,138
Rio Arriba	24,584	6,993	3,922
Taos	20,504	6,076	3,489
San Miguel	17,525	4,088	1,960
Grant	16,355	3,993	2,150
Cibola	14,818	4,783	2,559
Luna	13,156	4,744	2,145
Lincoln	12,037	3,532	2,020
Roosevelt	11,399	3,602	1,689
Los Alamos	10,858	615	389
Socorro	10,573	3,315	1,593
Torrance	9,506	2,728	1,458
Colfax	7,866	1,928	1,041
Sierra	6,345	1,814	873
Quay	5,219	1,495	747
Mora	2,930	768	396
Hidalgo	2,787	838	402
Guadalupe	2,388	641	317
Union	2,180	617	329
Catron	2,112	703	365
De Baca	1,110	340	185
Harding	411	129	73
Total	1,244,884	345,794	187,675
Data Source	Census Bureau - SAHIE Data - 2010		

Population of Native Americans – With No Health Insurance Coverage

County	Population of Native Americans – With No Health Insurance Coverage
McKinley	22,772
San Juan	22,142
Bernalillo	8,647
Sandoval	5,496
Cibola	4,182
Rio Arriba	1,912
Otero	1,670
Santa Fe	1,235
Valencia	537
Dona Ana	473
Taos	359
Eddy	286
Total	69,711



As part of the Mandatory Intent to Bid, Bidding Vendors will sign a Non-Disclosure Agreement, and can receive report detailing uninsured demographics, uninsured awareness of the ACA and the NMHIX, and other important data that will be vital to understanding the approach needed for a successful open enrollment period for 2014-2015.

1.5 Contract Term

The NMHIX intends on contracting with selected vendors for each Track for a term of approximately 5 months, with an option for an additional 9 months.

Contract Period	Dates
Contract Period 1	November 1, 2014 – March 31, 2015
Option Period 1	April 1, 2015 – December 31, 2015

Contract Period 1 is intended to assist with the 2014-2015 Open Enrollment Period. The NMHIX may choose to procure these same services to prepare for the 2015-2016 Open Enrollment Period.

2: Administrative Information

2.1 Procurement Administrator

The Procurement Administrator for this project shall be:

Michael Dineen
Director, Customer Care
New Mexico Health Insurance Exchange (NMHIX)
6301 Indian School Road NE, Suite 100
Albuquerque, NM 87110
rfp@nmhix.com

Offerors on the list of interested offerors will be notified if the Procurement Administrator changes during the procurement. Please include “Marketing and Outreach RFP” as the subject line of any emails.

2.1 List of Interested Offerors

Offerors who notify the Procurement Administrator of their intent to submit a Proposal by the deadline listed in “Key Dates” will be placed on a list of interested Offerors. The intent to submit must be emailed to rfp@nmhix.com by 3 p.m. Mountain Time on Friday, September 26th. The intent to bid must include the name of Offeror, contact information, and RFP Title and number. An Offeror’s intent to submit a proposal is not required binding, and interested Offerors may opt not to submit a proposal.

NMHIX will send notices of RFP addenda to the list of interested Offerors. Offerors who fail to notify the Procurement Administrator of their intent to submit a proposal by the deadline listed in “Key Dates” may nevertheless submit a Proposal, but they may not receive addenda or other notices.

2.2 Restriction on Communications

From the issue date of this RFP until the Evaluation Committee announces its preferred Contractor, all communications related to this RFP must be with the Procurement Administrator, and all such communications must be in written form via email to rfp@nmhix.com. The Procurement Administrator will respond only to written questions regarding the procurement process and this RFP. Oral questions will not be accepted. Offerors may be disqualified if they contact any employee or affiliate of NMHIX regarding this RFP.

2.3 Questions, Requests for Clarification, and Suggested Changes

Offerors are invited to submit written questions and requests for clarifications regarding this RFP. Offerors may also submit suggestions for changes to the requirements of this RFP. The questions, requests for clarifications, or suggestions must be in writing and received by the Procurement Administrator before the date and time listed in “Key Dates.” If the questions, requests for clarifications, or suggestions pertain to a specific section of this RFP, Offeror shall reference the page and section number. If NMHIX decides to answer a question or adopt a suggestion that modifies this RFP, NMHIX will issue an addendum to this RFP.

2.4 Amendment and Withdrawal of this RFP

NMHIX reserves the right to amend or withdraw the RFP at any time and for any reason. Amendments and or notices of withdrawal will be sent to the list of interested Offerors.

2.5 Amendment and Withdrawal of Proposals

Offerors may amend or withdraw their Proposals at any time before the Proposal deadline listed under “Key Dates.” The amendment must be in writing, signed by Offeror, and received by the time set for the receipt of Proposals. Offerors must notify the Procurement Administrator in writing prior to the deadline for Proposals if they wish to completely withdraw their Proposals.

2.6 Submission of Proposals

The Procurement Administrator **must receive** all components of the Proposal by the deadline listed under “Key Dates.” It is Offeror’s responsibility to ensure that the Proposal is received prior to the deadline. Postmarking by the due date will not substitute for actual receipt of the Proposal.

2.7 Costs of Preparing the Proposal

The costs of preparation and delivery of the Proposal are solely the responsibility of Offeror.

2.8 No Commitment to Contract

NMHIX reserves the right to reject any or all Proposals received in response to this RFP at any time prior to the execution of the Contract. This RFP may be cancelled at any time and any and all proposals may be rejected in whole or in part in the NMHIX determines, in its sole discretion, that doing so is in the best interests of the NMHIX. Issuance of this RFP in no way constitutes a commitment by NMHIX to award a contract.

2.9 Rejection of Proposals

NMHIX may reject outright and not evaluate any Proposal that does not comply with the terms of this RFP or does not meet the mandatory specifications of this RFP.

2.10 Subcontractors

Contractor is solely responsible for fulfillment of the Contract. NMHIX will make payments only to Contractor. Contractor will not subcontract any portion of the services to be performed under the Contract without the prior expressed written approval of NMHIX. Contractor will include all proposed subcontractors in its Proposal. In the event NMHIX approves any subcontractor, Contractor will remain fully responsible for complying with the duties and obligations under the Contract.

Any use of subcontractors by Contractor will not obligate NMHIX as a party to the subcontract, nor create any right, claim, or interest for the subcontractor against NMHIX, its agents, employees, representatives, or successors. The parties agree that there are no third party beneficiaries, intended or otherwise, to the Contract.

2.11 Reference Checks

NMHIX reserves the right to contact any reference to assist in the evaluation of the Proposal, to verify information contained in the Proposal, and to discuss Offeror's qualifications and the qualifications of any subcontractor identified in the Proposal.

2.12 Information from Other Sources

NMHIX reserves the right to obtain and consider information from other sources concerning an Offeror, such as Offeror's capability and performance under other contracts, the qualifications of any subcontractor identified in the Proposal, Offeror's financial stability, past or pending litigation, and other publicly available information.

2.13 Proposal Clarification Process

NMHIX reserves the right to contact an Offeror after the submission of Proposals for the purpose of clarifying a Proposal. This contact may include written questions, interviews, site visits, or requests for corrective pages in Offeror's Proposal. NMHIX will not consider information received from or through Offeror if the information materially alters the content of the Proposal or the type of services Offeror is offering to NMHIX. An individual authorized to legally bind Offeror shall sign responses to any request for clarification. Failure to comply with requests for additional information may result in rejection of the Proposal.

2.14 Disposition of Proposals

All Proposals become the property of NMHIX and shall not be returned to Offeror.

2.15 Disclosure of Proposal Contents

The NMHIX shall keep submitted proposals confidential until negotiation and award of a contract is completed; provided that NMHIX reserves the right to discuss the content of the proposals publicly as necessary to secure approval and award of a contract. After negotiation and award of the contract is complete, all proposals and documents pertaining to the proposals will be open to the public in accordance with state and federal laws relating to public records.

If an Offeror submits material the Offeror believes is confidential under state and federal law, the Offeror shall request confidential treatment and shall conspicuously mark the outside of the Proposal as containing confidential information and shall mark each page upon which confidential information appears as containing confidential information.

If a request is received for disclosure of material for which an Offeror has made a written request for confidentiality, the NMHIX shall examine the Offeror's request and make a written determination that specifies which portions of the proposal should be disclosed. Unless the Offeror takes legal action to prevent the disclosure, the proposal will be so disclosed. The proposal shall be open to public inspection subject to any continuing prohibition on the disclosure of confidential material.

As between NMHIX and the Offeror, NMHIX will own all right, title and interest in and to and all ideas presented in any Proposal, and shall therefore have the right to use any such ideas.

2.16 Release of Claims

By submitting a Proposal, Offeror agrees that it waives and releases all claims or causes of action against NMHIX based on any misunderstanding concerning the information provided in this RFP or concerning NMHIX's failure, negligent or otherwise, to provide Offeror with pertinent information in this RFP.

2.17 Offeror Presentations

At the sole discretion of NMHIX and/or its Evaluation Committee, some Offerors may be asked to participate in oral interviews, presentations, and/or demonstrations prior to the selection of a Contractor. This process is intended to allow Offerors to demonstrate their proposed solutions and clarify any elements of their Proposal. Any cost associated with interviews, presentations, and/or demonstrations will be borne solely and entirely

by Offeror. The presentation may occur at NMHIX's offices, via the Internet, or at another location as specified by NMHIX.

2.18 Award Notice and Acceptance Period

A "Notice of Intent to Award" will be sent to the successful Offeror for each Track. Negotiation and execution of the Contract shall be completed no later than 14 business days from the date of the Notice of Intent to Award or such other time as designated by NMHIX. If the successful Offeror fails to negotiate and execute in good faith a final agreement by that date, the NMHIX, in its sole discretion, may cancel the award and award the Contract to another Offeror NMHIX believes meets this RFP's requirements and will provide the best value to NMHIX. Notice will be sent to the unsuccessful Offerors once a contract is executed or at such other time as designated by NMHIX.

2.19 No Contract Rights until Execution

No Offeror shall acquire any legal or equitable rights through this RFP or any action or inaction by NMHIX unless and until the Contract has been fully executed by the successful Offeror and NMHIX.

2.20 Choice of Law and Forum

This RFP and the Contract shall be governed by the laws of the United States and of the State of New Mexico, without regard to principles of conflicts of law. Any and all litigation or actions commenced in connection with this RFP shall only be brought in a federal or state court of competent jurisdiction in the State of New Mexico.

2.21 Protests

Any actual or prospective Offeror who believes it is aggrieved in connection with the solicitation or award of a Contract hereunder may protest to the Procurement Administrator of NMHIX. Such a protest shall be submitted in writing within five working days after the aggrieved Offeror knows or should have known of the facts giving rise thereto; provided that a protest of an award or proposed award shall in any event be submitted in writing within five working days after the award of the Contract; provided further that no protest based upon the content of the RFP or other solicitation documents shall be considered unless it is submitted in writing prior to the date set for the receipt of offers.

The RFP Procurement Administrator or a NMHIX designee may settle and resolve a protest concerning the solicitation or award of a contract hereunder. If the protest is not resolved by mutual agreement, the NMHIX Chief Executive Officer or a designee shall promptly issue a decision in writing to uphold or deny the protest.

2.22 Eligible Applicants

Health insurance issuers and producers are not eligible to submit a proposal. NMSA 1978, § 59A-23F-4(F).

2.23 Contract Terms and Conditions

The contract between NMHIX and an Offeror will follow the format specified by the NMHIX and contain the terms and conditions set forth in Sample Contract (Attachment C). However, the NMHIX reserves the right to negotiate with any Offeror provisions in addition to those contained in this RFP (Sample Contract). The contents of this RFP, as revised and/or supplemented, and the successful Offeror's proposal will be incorporated into and become part of any resultant contract.

The NMHIX discourages exceptions to contract terms in the sample contract and conditions in the RFP. Exceptions may cause a proposal to be rejected as nonresponsive when, in the sole judgment of the NMHIX (and the evaluation committee), the proposal appears to be conditioned on the exception, or correction of what is deemed to be a deficiency, or an unacceptable exception which would require a substantial proposal rewrite to correct is proposed.

Should an Offeror object to any of the terms and conditions in RFP Sample Contract (Attachment 2) strongly enough to propose alternate terms and conditions in spite of the above, the Offeror must propose specific alternative language. The NMHIX may or may not accept the alternative language. General references to the Offeror's terms and conditions or attempts at complete substitutions are not acceptable to the NMHIX and will result in disqualification of the Offeror's proposal.

Offerors must provide a brief discussion of the purpose and impact, if any, of each proposed change followed by the specific proposed alternate wording.

2.24 Disclosure Regarding Responsibility

Offerors agree to disclose whether they, or any principal of their company:

- 1: Are presently debarred, suspended, proposed for debarment, or declared ineligible for award of contract by any federal entity, state agency or local public body.
- 2: Have within a three-year period preceding this offer, been convicted of or had civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) contract or subcontract; violation of Federal or state antitrust statutes related to the submission of offers; or commission in any federal or state jurisdiction of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violation of Federal criminal tax law, or receiving stolen property.
- 3: Are presently indicted for, or otherwise criminally or civilly charged by any (federal state

- or local) government entity with, commission of any of the offenses enumerated in paragraph 2 of this disclosure.
- 4: Have preceding this offer, been notified of any delinquent Federal or state taxes in an amount that exceeds three thousand dollars (\$3,000.00) of which the liability remains unsatisfied.
 - 4.1 Taxes are considered delinquent if both of the following criteria apply:
 - 4.1.1 The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge of the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.
 - 4.1.2 The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.
 - 5: Have within a three year period preceding this offer, had one or more contracts terminated for default by any federal or state agency or local public body.
 - 6: Principal, for the purpose of this disclosure, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity or related entities.
 - 7: The Offeror shall provide immediate written notice to the NMHIX if, at any time prior to contract award, the Offeror learns that its disclosure was erroneous when submitting or became erroneous by reason of changed circumstances.
 - 8: A disclosure that any of the items in this requirement exist will not necessarily result in withholding an award under this solicitation. However, the disclosure will be considered in the determination of the Offeror's responsibility. Failure of the Offeror to furnish a disclosure or provide additional information as requested will render the Offeror nonresponsive.
 - 9: Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the disclosure required by this document. The knowledge and information of an Offeror is not required to exceed that which is the normally possessed by a prudent person in the ordinary course of business dealings.
 - 10: The disclosure requirement provided is a material representation of fact upon which reliance was placed when making an award and is a continuing material representation of the facts. If during the performance of the contract, the contractor is indicted for or otherwise criminally or civilly charged by any government entity (federal, state or local) with commission of any offenses named in this document the contractor must provide immediate written notice to the Procurement Manager or Buyer. If it is later determined that the Offeror knowingly rendered an erroneous disclosure, in addition to other remedies available to the NMHIX, the NMHIX may terminate the involved contract for cause. Still further the NMHIX may suspend or debar the contractor from eligibility for future solicitations until such time as the matter is resolved to the satisfaction of the NMHIX.

2.25 Conflict of Interest

By submitting a proposal pursuant to this RFP, an Offeror warrants that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance or services required under the Agreement.

The Offeror certifies requirements of the Governmental Conduct Act, Sections 10-16-1 through 10-16-18, NMSA 1978, regarding contracting with a public officer or state employee or former state employee, have been followed. The Offeror also certifies compliance with all federal provisions related to conflicts of interest, including but not limited to those contained in 45 C.F.R. 92.36, the Affordable Care Act, and the HHS Grants Policy Statement, published January 1, 2007.

2 Scope of Work

3.1 Proposal Themes

The NMHIX requests that Offerors keep the following themes in mind while preparing responses to the RFP Tracks. The NMHIX expects vendors chosen through this RFP to:

- Focus on explaining affordability and value of health insurance in simple, understandable terms to the NMHIX target market;
- Focus on creating a clear NMHIX brand that will resonate with New Mexico consumers;
- Use research and lessons learned to focus on tasks that will maximize individual enrollment in the Exchange;
- Focus on effectively engaging various market segments, e.g.: New Mexico Hispanics, Native Americans, those most likely to benefit from premium subsidies, young invincibles, and other market segments;
- Collaborate and coordinate with Qualified Health Plans (QHPs) and other NMHIX Partners;
- Bring innovative and “out-of-the-box” strategies and recommendations to the NMHIX; and,
- Be flexible, allowing for mid-course adjustments, as necessary.

3.2 Scope of Work Tracks

The Scope of work will be split into 4 categories as follows:

1. Marketing Campaign
2. Communications and Outreach
3. Website Development
4. Evaluation and Research.

NMHIX encourages Offerors to consider establishing strong partnerships with subcontractors that are experts and have experience in specialized areas, in order to ensure that project goals, objectives and deliverables are achieved. While services may be provided by subcontractors or other vendors, the Marketing Campaign Vendor will serve as the overall project manager and will be responsible to ensure that all project goals, objectives and deliverables are met. NMHIX will hold the Marketing Campaign Vendor responsible in managing the remaining vendor(s) brought in through this RFP process.

3.3 Track 1: Marketing Campaign

Bidders of Track 1: Marketing Campaign will serve as the lead of the Marketing and Outreach efforts and will be responsible for ensuring the coordination of all portions of

the outreach campaign and strategies across all tracks.

Bidders are also asked to analyze the data received as *Attachment A – Polling and Uninsured Data* to identify additional populations, target areas and strategies.

The submitted proposal should address a customized approach for each region of the State to facilitate maximum exposure to and enrollment of the target NMHIX population.

3.3.1 Scope of Work Details

Major Tasks	Sub Tasks
Coordination of all Tracks across all vendors and functions	<ul style="list-style-type: none"> • Vendor must play a project management function overseeing all tracks enumerated in this Request for Proposals (RFP) • The marketing campaign must include a diverse media mix to reach diverse target populations in culturally and linguistically appropriate ways
Develop and manage an Integrated Strategy (re-branding across all channels and platforms, campaign development and management)	<ul style="list-style-type: none"> • Prioritize and recommend options, based on data and lessons learned • Develop an integrated strategy across all channels and platforms based on Research and Polling, Inc. data • Develop an overall creative approach and theme for the consumer and small business campaigns • The Marketing campaign must be developed and targeted towards the uninsured NMHIX eligible populations • Primary focus should be on enrollments through the Individual Marketplace • The campaign should also provide for strategies for the SHOP marketplace
Paid Media and Earned Media (TV, Radio, Print, Outdoor, etc.)	<ul style="list-style-type: none"> • Assess and identify specific media to be used • Determine timing, frequency, penetration and length of placement • Conduct contract negotiations for innovative media placement designed to get NMHIX the best available rates and value-added opportunities • Work with media vendors to traffic all creative materials in a timely manner • Coordinate with the Communications and Outreach Director at NMHIX on all activities • Work with Outreach vendor to develop additional, value-added options on media buys, to support outreach

	<ul style="list-style-type: none"> • Television – Development to include content, editing and recording; English and Spanish language and multiple formats • Radio – Development to include content, editing and recording; English and Spanish language and multiple formats • Print Media – Development to include the design of various formats of print advertisements • Outdoor – Development to include the design of transit, billboards, athletic venues/stadiums, retail, etc. • Provide itemized media costs
Educational and Promotional Materials, including use of NM Print Vendor	<ul style="list-style-type: none"> • Design a variety of collateral materials to support outreach and educations enrollment efforts • Design and coordinate the production of all Educational and Promotional Materials • Produce all Educational Materials within the State of New Mexico or contract with a vendor within the state for production of all materials • Responders must include at minimum one (1) example of a collateral item aimed at the uninsured
Design social media campaign	<ul style="list-style-type: none"> • Design and assist in implementing a social media campaign that is in alignment with the overall strategic goals • Assist the outreach vendor in managing all accounts and provide support as needed
Assessment and Data-Driven Recommendations of Alternative Strategies, including mobile tours	<ul style="list-style-type: none"> • Conduct an assessment of data-driven best practices and alternative strategies, including mobile tours, and resulting metrics and make recommendations to the NMHIX on additional strategies.
Development of on-going sustainable marketing plan and strategies	<ul style="list-style-type: none"> • Develop recommendations for a marketing, outreach, and communications plan for the NMHIX to consider to allow the NMHIX to be financially sustainable after the termination of federal grant funding.
Include proposed preliminary strategic plan	<ul style="list-style-type: none"> • Within 5 calendar days of contract award provide the NMHIX with a preliminary strategic plan and work with the NMHIX on an ongoing basis to refine the plan

3.3.2 Company Requirements

- Preference may be given to a firm with significant NM experience and an established track record of working with New Mexico populations
- Understanding of the NM marketplace and health insurance sales to consumers and demonstrate the typical challenges that exist
- Experience with the health industry, preference may be given for health insurance or health insurance exchange experience
- Technical expertise with ACA – demonstrate an working understanding of Advance Premium Tax Credits (APTCs)
- Demonstrated experience with projects or marketing/communications campaigns
- Prior experience developing and executing successful broad strategic marketing and media campaigns

3.3.3 Personnel Requirements

- Dedicated Project Manager during Open Enrollments
- NM-based Project Manager, co-located at NMHIX offices or at the offices of a NMHIX partner organization in Albuquerque
- Technical expertise of proposed staff with the Affordable Care Act (ACA) or your ability to acquire expertise

Provide a list of key personnel, including any proposed subcontractors and their roles, who will work on this project, detailing their training and work experience and the anticipated amount and / or portion of time each individual will devote to this project. Provide short biographies for key personnel, including proposed subcontractor personnel, and the experience of each with similar projects (not to exceed 2 pages per individual)

3.4 Track 2: Communications and Outreach

Bidders of Track 2 - Communications and Outreach must work in conjunction with the Marketing Campaign Vendor in designing and implementing a Communications and Outreach plan. Marketing materials and strategies will be received from the Marketing Campaign Vendor.

Bidders are asked to analyze the data received as *Attachment A – Polling and Uninsured Data* to identify populations, target areas and potential strategies.

The submitted proposal should address a customized approach for each region of the State to facilitate maximum exposure to and enrollments of the NMHIX target population of uninsured individuals between 138% and 400% of the federal poverty level.

The submitted proposal should take into account the existing outreach and education partnerships NMHIX has currently, which include the New Mexico Association of Counties, the Association of Commerce and Industry, the Albuquerque Hispano Chamber of Commerce, and the Greater Albuquerque Chamber of Commerce. The NMHIX has

issued a separate RFP for additional outreach partners. Partnerships with trusted community institutions and organizations are vital to a strong outreach and education program. NMHIX encourages the Bidder to include details on establishing further or bolstering relationships with many diverse organizations, such as community-based organizations, non-profits, service focused, faith-based, consumer organizations, health care providers, schools, state agencies, retail partners, and colleges and universities.

3.4.1 Scope of Work Details

Major Tasks	Sub Tasks
Integrated Strategy for Communications and Outreach	<ul style="list-style-type: none"> • Drive the development of communications, outreach and education strategies • Develop a comprehensive, coordinated strategy for how to target the identified populations • The outreach and communications campaign must include a diverse media mix to reach diverse target populations in a culturally and linguistically appropriate ways • Develop a targeted outreach plan for areas in the state with limited or no internet access • Identify and pursue news and feature placement opportunities across all forms of media
Media Relations (including press releases, media relationships, interviews and coordination, crisis management, regular media monitoring - daily news scans, nationally and NM)	<ul style="list-style-type: none"> • Develop and execute a public relations plan that parallels the goals and objectives of the overarching Marketing Campaign • Develop and execute a media relations campaign • Develop a strategy for coordinating these efforts, drawing on prior knowledge and potentially already established relationships with such organizations • Schedule and lead regular coordination meetings on media relations • Schedule and lead regular updates with NMHIX leadership and partners • Develop and disseminate press releases in a variety of media outlets including general, ethnic press, trade publications, periodicals, newsletters and national publications. Conduct daily news scans at both local and national level, develop and maintain FAQs.
Outreach Partner and Event Support (including developing presentations, media promotion of events, etc.)	<ul style="list-style-type: none"> • Coordinate outreach events throughout the state prior to and during the 2014-2015 open enrollment period • Develop a plan to mobilize activities at the grassroots level and what resources will be provided or utilized to ensure sufficient support is available throughout the state • Coordinate and support other partners and

	<p>stakeholders holding outreach events</p> <ul style="list-style-type: none"> • Promote events to launch, roll out and conclude campaigns as appropriate • Develop event outreach and promotion materials that can be shared with outreach partners • Provide the NMHIX with a calendar of outreach events with daily updates • Hold regular meetings with the NMPCA regional coordinators to assist in event and outreach planning and implementation • Maintain mailing/email lists (agent/broker, HCG, other partners, postcard lists, consumers, stakeholders) • Work with Marketing Campaign vendor to maximize impacts of media buys and to bring the Marketing Campaign vendor ideas from grassroots efforts and partners • Develop and sustain relationships with outreach partners, Health Care Guides, brokers • Attend and provide support to various stakeholders, Board, and Board Committee meetings, as directed by the NMHIX. • Identify additional potential partnerships • For consumers with limited or no internet access, develop a booklet of QHP information and other tools so consumers can conduct plan comparisons
<p>Implement and Manage Social Media Campaign and Provide Support</p>	<ul style="list-style-type: none"> • Develop an integrated social media plan for the NMHIX designed to create a dialogue with uninsured individuals and influencers of the uninsured in New Mexico about the new health insurance options, access points for enrolling in coverage, and sharing experiences • Recommend platforms suitable for the various target audiences that parallel the integrated marketing campaign • Manage and operate all social media accounts that are determined to be effective with the target market (e.g. Twitter, Facebook, Tumblr, etc. • Make daily or as appropriate updates to all accounts • Recommend and execute additional strategies to achieve communications goals • Build an asset library to be utilized across all channels that includes photos, videos, widgets, podcasts, and interviews

Draft Annual Report, per the direction of the NMHIX	<ul style="list-style-type: none"> • Assist the NMHIX with development, editing, and production of an Annual Report
Include proposed preliminary strategic plan	<ul style="list-style-type: none"> • Within 5 calendar days of contract award provide the NMHIX with a preliminary strategic plan and work with the NMHIX on an ongoing basis to refine the plan

3.4.2 Company Requirements

- Preference may be given to a firm with significant NM experience and an established track record of working with New Mexico populations
- Evidence of success in implementing grassroots outreach strategies
- Demonstrated company understanding of the political environment in New Mexico
- Demonstrated experience with developing and conducting relevant community outreach projects in New Mexico or similar states
- Demonstrated experience in conducting education and outreach campaigns to targeted populations
- Demonstrated experience in communicating state-wide programs to local and rural communities with varying cultural differences
- Demonstrated understanding of New Mexican cultural differences
- Demonstrated experience in utilizing multiple forms of media to accomplish education and outreach campaigns in New Mexico or similar states
- Demonstrated experience with managing social media campaigns

3.4.3 Personnel Requirements

- Demonstrated engagement in businesses related to the health industry
- Demonstrated ability to effectively work as part of a project team
- Sufficient and qualified staff to develop and maintain relationships, on behalf of NMHIX
- Sufficient and qualified staff to coordinate and assist with events, on behalf of NMHIX
- Technical expertise of proposed staff with the Affordable Care Act (ACA) or your ability to acquire expertise
- Provide a list of key personnel, including any proposed subcontractors and their roles, who will work on this project, detailing their training and work experience and the anticipated amount and / or portion of time each individual will devote to this project. Provide short biographies for key personnel, including proposed subcontractor personnel, and the experience of each with similar projects (not to exceed 2 pages per individual)

3.5 Track 3: Website Development

Bidders of Track 3: Website Development are expected to have explicit technical experience in website design and integration including mobile site and application development. It is expected this vendor will revamp the BewellNM.com and NMHIX websites. Bidders of Track 3: Website Development will be required to work in conjunction with all other vendors as they receive support and materials from the other vendors.

Bidders are asked to analyze the data received as *Attachment A – Polling and Uninsured Data* for an understanding of the New Mexico target market and prior strategies.

3.5.1 Scope of Work Details

Major Tasks	Sub Tasks
Implement Redesign of English and Spanish Websites (based on Branding)	<ul style="list-style-type: none"> • Bewell.com vs. NMHIX.com websites – make recommendations on how to combine these websites into a single entity • Combine functionality of both websites per request of NMHIX • Dashboard integration and maintenance
Manage Website and Infrastructure	<ul style="list-style-type: none"> • Regular updating all aspects of website • Develop and execute a comprehensive search engine optimization marketing (SEM) and search optimization strategy (SEO) for NMHIX.com / Bewellnm.com
Innovation Flexibility (i.e., mobile app, other ideas...)	<ul style="list-style-type: none"> • Propose innovative web-based tools and functionality • Manage and implement digital display advertising and promotions for social media sites, mobile, SMS etc.
Include proposed preliminary strategic plan	<ul style="list-style-type: none"> • Within 5 calendar days of contract award provide the NMHIX with a preliminary strategic plan and work with the NMHIX on an ongoing basis to refine the plan

3.5.2 Company Requirements

- Preference may be given to a firm with significant NM experience and an established track record of working with New Mexico populations
- Demonstrated ability to effectively work as part of a project team
- Demonstrate any experience with the Affordable Care Act (ACA) or health insurance exchanges
- Demonstrated significant technical experience with website integration and development

- Experience with mobile website development, advertising, Search Engine Optimization and Search Engine Marketing
- Demonstrated experience with development of mobile applications
- Experience with Social Media Campaigns

3.5.3 Personnel Requirements

- Explain technical expertise of proposed staff with the Affordable Care Act (ACA) or your ability to acquire expertise
- Provide a list of key personnel, including any proposed subcontractors and their roles, who will work on this project, detailing their training and work experience and the anticipated amount and / or portion of time each individual will devote to this project.
 - Provide short biographies for key personnel, including proposed subcontractor personnel, and the experience of each with similar projects (not to exceed 2 pages per individual)

3.6 Track 4: Evaluation and Research

Bidders of Track 4: Evaluation and Research will be tasked with objectively evaluating the effectiveness of the Marketing and Outreach campaign to ensure vendors have positively impacted the targeted populations. This vendor will also focus on conducting targeted research to assist the other vendors in identifying and properly targeting the appropriate populations.

Bidders are asked to analyze the data received as *Attachment A – Polling and Uninsured Data* to understand previous research and evaluation.

3.6.1 Scope of Work Details

Major Tasks	Specific Tasks
Evaluation of all Marketing and Communication Strategies.	<ul style="list-style-type: none"> • Develop a comprehensive evaluation and research plan • Provide a comprehensive analysis of the overarching Marketing and Communication strategy • Include related metrics on the effectiveness and efficacy of the proposed goals • Recommend and perform market research to support comprehensive recommendations and assistance for all aspects of marketing, communications, and outreach

Evaluate Marketing and Outreach Programs: Including Focus Groups, Message Testing, and Ensure regular / continuous assessment and integration with all tracks	<ul style="list-style-type: none"> • Conduct focus groups (English and Spanish) with diverse segments of the target market to test marketing and communications strategies to reach the identified target populations in the most effective and cost efficient manner • Solicit input and feedback on the messaging and branding of the NMHIX and on the creative concepts for the advertising campaign
Include proposed preliminary strategic plan	<ul style="list-style-type: none"> • Within 5 calendar days of contract award provide the NMHIX with a preliminary strategic plan and work with the NMHIX on an ongoing basis to refine the plan
Cost Proposal	<ul style="list-style-type: none"> • Develop recommendations for Innovative Pay for Performance (P4P) ideas – with either outcomes based or financial based incentives

3.6.2 Company Requirements

- Requirement: NM-based or significant NM experience - show us what you have done at grassroots level; understanding of NM political environment
- Demonstrated ability to effectively work as part of a project team
- Demonstrate any experience with the Affordable Care Act (ACA) or health insurance exchanges
- Demonstrated experience with developing and conducting Research and Evaluation of Marketing and Outreach campaigns
- Demonstrated experience in conducting focus groups, targeted interviews, and soliciting feedback about targeted programs
- Demonstrated experience in evaluating the effectiveness of targeted programs and advertising campaigns

3.6.3 Personnel Requirements

- Explain technical expertise of proposed staff with the Affordable Care Act (ACA) or your ability to acquire expertise
- Provide a list of key personnel, including any proposed subcontractors and their roles, who will work on this project, detailing their training and work experience and the anticipated amount and / or portion of time each individual will devote to this project. Provide short biographies for key personnel, including proposed subcontractor personnel, and the experience of each with similar projects (not to exceed 2 pages per individual)

4 Form and Content of Proposals

4.1 RFP Deliverables

Submit an original and fifteen (15) hard copies of the Technical Proposal. The original copy of the Proposal must be signed in ink by an authorized member of the Bidder. In addition, each Bidder must provide an electronic copy of the Proposal (including all attachments, exhibits, etc.) in Portable Document Format (“PDF”). Please provide the electronic copy on a flash drive / portable USB drive. Vendors who are bidding on multiple tracks may submit a single binder with clearly delineated tasks.

Provide fifteen (15) copies of the Price Proposal in a separately sealed envelope clearly marked on the outside “Price Proposal” along with the Bidder’s name. An electronic copy of the Price Proposal shall be included in the envelope.

For purposes of structuring the price proposal, the Bidder will only be paid for services after they are completed, except where otherwise specified in the Contract.

Proposals will be evaluated on “best value” as specified below.

Format and Length Proposals should be submitted with single spaced text in 12-point font with one-inch margins. Proposals should be spiral bound. It is strongly encouraged to submit proposals with double-sided pages.

4.2 Cover Letter

Provide a cover letter identifying the main contact person for the Proposal, any subcontractors, and your eligibility as a Bidder to this RFP. In the Cover Letter, the Bidder shall also guarantee in writing that the services offered in the Proposal are currently available and that all Proposal terms, including price, will remain firm for a minimum of 90 days following the deadline for submitting Proposals. Please detail in the cover letter which tracks the vendor intends on bidding.

4.3 Content of Proposal

The following information is required to be included in the Proposal in the order given below:

4.3.1 Qualifications and Experience

Describe the Bidder’s form of business, physical locations, number of employees, client base, etc.

Provide a brief, descriptive statement describing the Bidder’s ability to deliver the

services sought under this RFP. Please tailor this section to cover broad experience relevant to the given tracks applied for.

Describe any clients that Bidder has provided services to that are engaged in businesses related to health care insurance exchanges or health insurance companies. Describe any relevant experience related to the ACA.

Provide a list of personnel, including subcontractors, per the Personnel Requirements section corresponding to each of the 4 Tracks. Also please address any requirements per the Company Requirements section corresponding to each of the 4 Tracks. If vendors are bidding multiple tracks, please delineate the Company and Personnel Requirements section for each track being applied for.

Additionally, provide information for the past ten years related to: (1) any sanctions or discipline issued against any of the Bidder's employees, partners, or managers; (2) any notices of defaults, damages, debarment, or other penalties incurred by the Bidder in connection with the performance of any contract; and (3) any litigation or threatened litigation, judgments, administrative or regulatory proceedings, or similar matters to which the Bidder or its employees, partners, or managers have been a party.

Complete the following template and include this information immediately following the cover letter:

RESPONDENT	Headquarter Location	Partners	Years in Business (lead)	No. Employees			Typical Client Size (lead)	Total Agency Billings (lead)
				Lead	Partners	Dedicated NMHIX		

4.3.2 References

Provide a comprehensive list of projects similar in scope/ size, or contracts executed in New Mexico, or relevant to this project, over the past 5 years.

Provide at least three references. Preference may be given to references that are related to work in New Mexico, or in the healthcare/ insurance field.

The reference must include the customer contact name, company, physical address, telephone number, email address, length of contract, and length of time that the account has been a reference.

4.3.3 Project Overview and Description

Address the Scope of Work in section 3 for each of the desired Tracks (1 – 4) and describe how your solution will address each of the Major Tasks and corresponding Sub Tasks. This section of your Proposal should follow the organizational structure and order of the Scope of Work. Bidders must include all items specifically identified in the Scope of Work. Proposals must address the entirety of the Scope of Work and provide sufficient detail to allow NMHIX to evaluate all elements of the Proposal.

4.3.4 Work Plan and Timeline

Bidders are required to provide a detailed work plan and timeline covering the Scope of Work. The timeline should be based on a full project plan and include all of the milestones and deliverables in the RFP.

The Bidder should provide a work plan that details the tasks and activities, durations, dependencies, and resources based on the proposed approach and methodology, which will be executed to create the noted deliverables.

4.3.5 Oral Interviews

Certain Bidders selected by the Evaluation Committee may be asked to participate in oral interviews related to their proposed solutions. This process is intended to allow Bidders to demonstrate their proposed solutions and clarify any elements of their Proposal. Any cost associated with the interviews will be borne solely and entirely by Bidder.

4.3.6 Detailed Price Proposal

Provide a Price Proposal for completing all tasks included in the scope of work for a given track. Bidders are invited to apply for any permutation of the set of tracks. A cost proposal template has been included as *Attachment B: NMHIX Marketing and Outreach RFP Cost Proposal*. Vendors who choose to bid on multiple or all 4 tracks are encouraged to offer a potential volume discount based on efficiencies and economies of

scale. Vendors may choose to add additional line items and detail to *Attachment B: NMHIX Marketing and Outreach RFP Cost Proposal*.

The price proposal must be inclusive of all taxes, travel expenses, materials, and print or production costs. Where applicable, please break out these costs to the greatest extent possible. To the extent the goods and services to be provided under the Contract are subject to any excise tax, public service tax, use tax, or any other federal or state tax, the Contractor, and not NMHIX, shall be responsible for and shall pay such tax. No additional payments shall be made to Contractor, or shall be made on Contractor's behalf, related to any tax. Contractor shall, at its expense, indemnify, defend with counsel reasonably approved by NMHIX, and hold harmless NMHIX, from and against any losses, liabilities, damages, penalties, costs, obligations, fees (including without limitation reasonable attorneys' fees), and expenses from any third party claim, action, suit or judgment related to failure to pay taxes related to the Contract.

Provide fifteen (15) copy of the price proposal in a separately sealed envelope clearly marked on the outside "Price Proposal" along with Bidder's name. The Bidder must propose a fixed price contract.

5 Proposal Evaluation

The below sections details the overall evaluation process.

5.1 Proposal Evaluation Logistics

5.1.1 Evaluation Schedule

NMHIX reserves the right to change and / or alter the proposed schedule to fit the needs of the assessment.

Activity	Date
Proposals Received	10/8/14
NMHIX staff/consultants prepare matrix of summary information and send to Evaluation Team	10/9/14 - 10/10/14
Evaluation Team Meeting and Selection of Finalists	10/10/14
NMHIX staff/consultants prepare list of additional questions for finalists, schedule interviews, conduct reference checks	10/10/14 - 10/17/14
Finalists Present to Evaluation Team--Interviews with Finalists, scoring, recommendation for vendor (s)	10/14/14 - 10/15/14
NMHIX staff/consultants prepare report to Board	10/15/14 - 10/17/14
Board decision on vendor (s)	10/17/14
Contract negotiations	10/17/14 -10/24/14
Contract (s) begin	10/27/14

5.2 Evaluation Overview

The Procurement Administrator will determine the method for proposal evaluation to be followed by the Evaluation Committee. The Evaluation Committee will make a recommendation to the Board of Directors. Once approved by the Board of Directors the Bidder will be notified of the Intent to Award the contract to that Bidder.

All Proposals received by the deadline will be evaluated by representatives of NMHIX and potentially outside experts (the "Evaluation Committee"). NMHIX reserves the right, based on the scores of the proposals, to create a short list of vendors who have received the highest scores that it may interview, ask to conduct demonstrations, and/or ask to provide presentations. NMHIX reserves the right to seek best and final offers from one or more Bidders.

5.3 Marketing Campaign Track – Evaluation Criteria

Organizational Capabilities/Background (25%)

Rating Considerations:

- Track record in creating branding and integrated marketing campaigns that deliver positive results.
- Ability to meet specific ROI measurements or other quantitative metrics.
- Relevant experience in health care industry and preferably health insurance industry.
- Track record of working with other partners on an integrated strategy.
- Technical expertise with ACA.
- Familiarity with New Mexico market and culture.

Creative (25%)

Rating Considerations:

- Documented success in branding and integrated marketing campaigns.
- Track record of creating differentiated, compelling, and focused creative executions.
- Use of NMHIX research results to drive creative approach.
- Imaginative, “out-of-the-box” use of media mix and strategies.
- Probability of effectiveness of strategy with New Mexico market and culture.
- Innovation and uniqueness to compel consumers to act.
- Effective approach for special target market segments (e.g. Hispanic, single males, etc.)
- Clearness of branding and messaging to effectively engage consumers.

Project Plan (15%)

Rating Considerations:

- Strategy for an integrated, coordinated campaign across all partners and RFP tracks.
- Responsiveness to scope requirements.
- Proposed plan for project management and organization.
- Use of NMHIX research results to drive project management and strategies.
- Ability to be nimble and redirect campaign and strategies as necessary.
- Understanding of NMHIX approach, partners, and goals.

References (10%):

Rating Considerations:

- Quality and appropriateness of references.

Budget Proposal/Media Planning & Buying (25%):

Rating Considerations:

- Experience in media planning and buying.
- Projected cost per enrollment.
- Leveraging of resources.
- Hourly rates.
- Total cost.

5.4 Communications and Outreach Track – Evaluation Criteria

Organizational Capabilities/Background (25%)

Rating Considerations:

- Track record in successful communications and outreach projects.
- Relevant experience in health care industry and preferably health insurance industry.
- Track record of working with other partners on an integrated strategy.
- Technical expertise with ACA.
- Familiarity with New Mexico market and culture.
- Grassroots knowledge of New Mexico media market and stakeholders.

Outreach and Communications Approach (25%)

Rating Considerations:

- Use of NMHIX research results to drive strategic approach.
- Imaginative, “out-of-the-box” strategies.
- Probability of effectiveness of strategy with New Mexico market and culture.
- Innovation and uniqueness to compel consumers to act.
- Effective approach for special target market segments (e.g. Hispanic, single males, etc.)
- Strong approach for mobilization or provision of grass-roots resources to ensure “boots-on-the-ground” throughout the state

Project Plan (15%)

Rating Considerations:

- Strategy for participation in an integrated, coordinated campaign across all partners and RFP tracks.
- Responsiveness to scope requirements.
- Proposed plan for project management and organization.
- Use of NMHIX research results to drive project management and strategies.
- Ability to be nimble and redirect strategies as necessary.
- Understanding of NMHIX approach, partners, and goals.

References (10%):

Rating Considerations:

- Quality and appropriateness of references.

Budget Proposal (25%):

Rating Considerations:

- Projected cost per enrollment.
- Leveraging of resources.
- Hourly rates.
- Total cost.

5.5 Website Track – Evaluation Criteria

Organizational Capabilities/Background (30%)

Rating Considerations:

- Track record of developing and maintaining successful websites on complex topics.
- Relevant experience in health care industry and preferably health insurance industry.
- Track record of working with other partners on an integrated strategy.
- Technical expertise with ACA.
- Familiarity with New Mexico market and culture.

Project Plan (30%)

Rating Considerations:

- Strategy for participation in an integrated, coordinated campaign across all partners and RFP tracks.
- Responsiveness to scope requirements.
- Proposed plan for project management and organization.
- Ability to be nimble and redirect strategies as necessary.

References (10%):

Rating Considerations:

- Quality and appropriateness of references.

Budget Proposal (30%):

Rating Considerations:

- Hourly rates.
- Total cost.

5.6 Evaluation and Research Track – Evaluation Criteria

Organizational Capabilities/Background (30%)

Rating Considerations:

- Track record in evaluation of marketing campaigns, consumer polling, consumer research.
- Relevant experience in health care industry and preferably health insurance industry.
- Track record of working with other partners on an integrated strategy.
- Technical expertise with ACA.
- Familiarity with New Mexico market and culture.

Project Management Plan (30%)

Rating Considerations:

- Proposed plan for project management and organization.
- Responsiveness to scope requirements.
- Use of NMHIX research results to date to drive project management and strategies.
- Ability to be nimble and provide real time data and recommendations.
- Understanding of NMHIX approach, partners, and goals.

References (10%):

Rating Considerations:

- Quality and appropriateness of references.

Budget Proposal (30%):

Rating Considerations:

- Leveraging of resources.
- Hourly rates.
- Total cost.

6 Attachment A - Polling and Uninsured Data and Additional Background Documents

Research and Polling, Inc. Data and Analysis

To be provided upon completion of a confidentiality form.



7 Attachment B – Marketing and Outreach Cost Proposal

Cost Proposal Required Format

Also available as an excel attachment

Track 1	Track 1: Marketing Campaign	Proposed Costs
	Coordination of all Tracks	
	Integrated Branding Strategy	
	Paid Media and Earned Media	
	Markup and Commission for Media Buys	
	Educational and Promotional Materials	
	Printing and Production Expenses	
	Social Media Campaign	
	Data Driven Recommendations	
	Develop Ongoing Sustainable Marketing Plan	
	Proposed Preliminary Strategic Plan	
Total Expenses	\$ -	
Track 2	Track 2: Communications and Outreach	Proposed Costs
	Strategy for Communications and Outreach	
	Media Relations	
	Outreach Partner and Event Support	
	Implement and Manage Social Media Campaign	
	Draft Annual Report	
	Include Proposed Preliminary Strategic Plan	
Total Expenses	\$ -	
Track 3	Track 3: Website Development	Proposed Costs
	Implement Re-design of Websites	
	Manage Website and Infrastructure	
	Innovation Flexibility	
	Include Proposed Preliminary Strategic Plan	
Total Expenses	\$ -	
Track 4	Track 4: Evaluation and Research	Proposed Costs
	Evaluation of Marketing and Communication Strategies	
	Evaluate Marketing and Outreach Programs	
	Include Proposed Preliminary Strategic Plan	
	Cost Proposal	
	Work Plan	
Total Expenses	\$ -	
Summary	Total Across Separately Bid Tracks	\$ -
	Total for all 4 Tracks with Volume Discount	

8 Attachment B – Marketing, Media and Communications RFP

Intent to Bid (non-binding)

Organization: _____

Contact Name: _____

Title: _____

Phone: _____

Email: _____

Signature: _____

Please email form to RFP@NMHIX.com no later than September 26, 2014 at 3 pm MST