



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

Project Management Services

RFP No. No. 2014/009

RFP Issued:
December 05, 2014

Proposals Due:
December 18th, 2014
3 P.M. Mountain Time

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1: Introduction

1.1 Key Dates

Event	Date
Issuance of RFP	Friday, December 05, 2014
Deadline to Submit Questions & Intent to Respond 5:00 PM MST	Tuesday, December 09, 2014, 5:00 PM MST
Response to Written Questions/RFP Amendments	Friday, December 12, 2014
Submission of Proposal (3 pm MST)	Thursday, December 18, 2014 3 PM MST
Proposal Evaluation	Tuesday, December 23, 2014
Vendor Interview Notifications	Wednesday, December 24, 2014
Vendor Interviews	Tuesday, December 30, 2014
Best and Final Bids Due	Friday, January 02, 2015
Anticipated Award Announcement	Friday, January 09, 2015

Offerors are asked to submit intent to respond to rfp@nmhix.com by Tuesday, December 09, 2014 at 5:00 PM MST.

Offerors are asked to hold December 30th open for potential onsite interviews. The NMHIX will alert vendors of the final dates and arrangements as soon as possible.

Following onsite interviews, Offerors will be asked to present Best and Final Offers (BAFO) to NMHIX. Included with the BAFO, Offerors will be asked to provide draft scope of work document and deliverables list to tie to vendor payments of successful Offerors.

Offerors will be asked to **begin working immediately** after signing a contract.

1.2 Background on BeWellNM, New Mexico’s 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 Susanna Martinez signed the Act on March 28, 2013 that created the New Mexico Health Insurance Exchange (NMHIX) also known as BeWellNM.

Our mission is to provide qualified individuals and employers with increased access to health insurance in New Mexico. NMNIX is governed by a 13-member board of directors that was appointed in April 2013.

The Exchange is operating a state-supported marketplace where New Mexico operates all exchange functions except enrollment. New Mexicans are enrolling via Healthcare.gov for 2014 and 2015. NMHIX is implementing an Integrated Eligibility and Enrollment system for 2016 Open Enrollment and beyond.

Additionally, NMHIX implemented a Small Business Health Options Program (SHOP) marketplace for small business in 2014.

1.3 Purpose of This RFP

The New Mexico Health Insurance Exchange (NMHIX) is seeking proposals for Project Management Services from qualified vendors to manage and oversee the design, development and implementation of an Integrated Eligibility and Enrollment System (Medicaid and Qualified Health Plans).

The NMHIX intends to select one Offeror who is capable of performing all services solicited in this RFP.

1.4 Contract Term

The NMHIX intends on contracting with selected Offeror for:

Contract Period	Dates
Initial Contract Period	Jan 1, 2015 – Dec 31, 2015
Optional Term 1	Jan 1, 2016 – June 30, 2016
Optional Term 2	July 1, 2016 – Dec 31, 2016

2: Administrative Information

2.1 Procurement Administrator

The Procurement Administrator for this project shall be:

Raj Shethia
Director, Information Technology
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 “PMO RFP” as the subject line of any emails.

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 if 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. 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 RFP Sample Contract (Attachment B). However, the NMHIX reserves the right to negotiate with any Offeror provisions in addition to those contained in this RFP. The contents of this RFP, as revised and/or supplemented, and a 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 B) 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.

3: Scope of Work

3.1 Overview

In addition to any other requirements, this Agreement requires the completion and submission of Deliverables, as identified in this Scope of Work. Activities related to the delivery and approach to delivery, including but not limited to:

- At the request of the NMHIX, the Offeror will develop “Deliverable Expectation Documents (“DED”),” for Deliverables listed in this Scope of Work. The DED will describe the Deliverable, expected specifications consistent with this Agreement and Acceptance criteria. The DED shall be submitted to the Procuring Agency for review. Upon final review and acceptance of the DED by the Procuring Agency, the Contractor shall submit the Deliverable in accordance with the DED.

Additionally, the Offeror shall:

- Become familiar with the NMHIX’s organization and operations in order to reduce its reliance on agency staff and improve its ability to obtain information required for successful Project completion.
- Become familiar with HSD and other state agencies and their requirements related to the NMHIX operations related to this project.
- Become familiar with other contractors and their requirements related to the NMHIX operations related to this project.
- Become familiar with accounting, project, and other operational related reports, documents, and forms related to meeting federal or other regulation project reporting requirements.
- Stay abreast of any new statutory or regulatory changes or revisions related to Affordable Care Act, Health Insurance Exchange/Marketplace, Medicaid and Child Support Enforcement as they relate to this project.
- Provide general project management support and quality assurance support to deliver responsive and reliable operations.
- Maintain compliance with all federal reporting requirements.
- Build and maintain information access, integration and reporting capabilities.
- Promote integrity in the delivery of project management artifacts and project documentation.
- Provide application-specific and operation-specific project management consulting and planning activities.

- Provide superior project management oversight and quality assurance across the scope of state agencies, local jurisdictions, and federal ACA partners.
- Provide program management support for the implementation of an information technology system solution for New Mexico’s Integrated Eligibility and Enrollment System. This includes, but is not limited to: the implementation of enrollment and eligibility functionality; individual marketplace; coordination with federal data HUB services; and connections with insurance carriers and state agencies such as the Office of the Superintendent of Insurance (OSI) and the Human Services Department (HSD).
- Assess, develop, and identify resources; oversee all phases of the project, including but not limited to planning, requirements, design, development, implementation, and disposition.
- Develop and execute an interagency and vendor timeline for the project to ensure that all steps are completed on time and within budget.
- Integrate and manage NMHIX, HSD, OSI, and NMHIX Board activities throughout the project lifecycle to ensure successful implementation of the HIX solution.
- Oversee the data migration effort needed to transfer data from the Federal Facilitated Exchange (FFE) or other data sources into the Integrated Eligibility and Enrollment System.

The Offeror will work closely with NMHIX Board of Directors, NMHIX, HSD, OSI, and Carriers staff at the local and enterprise level. The resulting deliverables will identify any commonalities and any unique requirements between healthcare and business processes including:

- Identifying alternative business processes
- Conducting analysis of those alternatives
- Sharing best practices from other SBMs
- Recommending and documenting optimal approach to success (business and infrastructure)
- User Acceptance Documentation, Testing, and Approval, End-to-End Documentation, Testing and Approval

3.2 Complete Operational Readiness [PMO Setup]

The Offeror will provide overall Project Management to NMHIX and affiliated partners for the establishment of the state based Health Insurance Marketplace solution including services for integrated eligibility (Medicaid and QHP), enrollment, and complete information technology systems.

Project Management will follow the principles of the Project Management Body of Knowledge (PMBOK) that assure that all activities and risks are identified, documented, and managed so that each requirements project will be continuously evaluated and monitored for timeliness and quality including:

- Provide written documentation of the deliverable sign-off procedures. The Offerors will produce a sign-off template. Both the procedure and template must be approved by the NMHIX. Deliverable sign-off procedures and template(s) are due within five (5) days of the Notice to Proceed.
- Maintain a complete electronic project document library and implement an appropriate project solution to allow monitoring, traceability, version control and edit/review functionality. NMHIX will have complete access to this library and tools at all times. This complete library will be delivered to NMHIX's designated share drive upon conclusion of the contract.
- Utilize an enterprise level management tool, which includes, at a minimum, a project portal, a collaboration site, a document repository, issue log and a risk management tool, to clearly record project management information, issues, risks, action items, project scope changes, deliverable review information, and other relevant project data.
- The Offeror will clearly capture, as applicable, hours expended and other pertinent data.
- Where applicable, effectively organize and manage the individuals proposed on the project. This involves utilization and integration of both Offeror's staff and NMHIX staff. The Offeror will be responsible for developing work plans, statements of work, project management plans, charters, and task lists that clearly delineate NMHIX responsibilities and the Offerors responsibilities and timelines. Such items as staff training and knowledge transfer must be addressed periodically throughout the contract period.
- The Offeror will provide regular reports to NMHIX on the status of all requirements projects.
- The Offeror will apply proven Project Management techniques and provide skilled Project Management personnel in performance of PMBOK.

3.3 Develop and Keep up-to-date Project Plans for Go-live and Post Production Stabilization

As part of Project Management, the Offeror will prepare a Project Plan, Complete Planning Expectations, Activities, and Guidelines that will include at least the following:

- The Project Management Approach, including such elements as how it will be facilitated, the level of detail necessary, how the functional area will be developed, how the development of architecture will be incorporated into the project, and whether there will be a need to develop any User Interface requirements, visual modeling or mockups, as well as whether a focus group is required;
- The Project Timeline, incorporating the major milestones and deliverables, including also the architecture deliverables that will be produced by other vendors on the project;
- Overall Project Plan of complete integrated eligibility and enrollment system implementation
- Requirements Management Plan
- Quality Management Plan

- Project Change Management Plan
- Document Control and Maintenance Plan
- Risk Management Plan, including risk identification and risk mitigation strategies; and
- Issues Management Plan
- Security & Privacy Management Plan
- Resource (Staff) Management Plan, including a Sustainability Staffing Model
- Vendor Management Plan
- Risk Management Plan, including risk identification and risk mitigation strategies; and
- Quality Assurance Plan, including how the Quality Guidelines will be used at each milestone/gate review.
- Project Change Management Plan

The Offeror will provide regular reports to NMHIX on the status of all project plans and will apply proven Project Management techniques and provide skilled Project Management personnel in performance of PMBOK.

3.3.1 Complete Health Information Technology Implementation Advanced Planning Document (IAPD) Submission and Approval

The Offeror are responsible for creating an IADP Submission on behalf of NMHIX and HSD. This will include preparing IAPD and Documentation for OCSE Submission and Revising IAPD and Documentation for Approval.

3.4 Ongoing Project Management thru system go-live and post production stabilization.

3.4.1 Manage Integrated Eligibility System Projects

The Offeror will provide overall Project Management to NMHIX and affiliated partners for the establishment of the state based Health Insurance Marketplace solution including services for integrated eligibility (Medicaid and QHP), enrollment, and complete information technology systems.

3.4.2 Complete Financial Analysis on Integrated Eligibility System Projects

The Offeror will develop a financial analysis of the Integrated Eligibility System Projects including design and development costs and long-term maintenance costs. Offeror should be prepared to offer alternatives and discuss cost implications of each decision in the development and implementation project plan.

3.4.3 Manage Project Reporting for Integrated Eligibility System Projects to Internal and External Stakeholders

The Offeror will meet with the NMHIX/HSD leadership weekly, or more frequently if requested by NMHIX. Bring together full project team to discuss project status and risks weekly. The purpose of these meetings will be to provide the NMHIX project and leadership team with an

independent verbal and written assessment of the implementation project status that the Offeror is monitoring and to make recommendations on any corrective action to keep the projects on schedule and within budget. The Offeror will include in its report an assessment of:

- Quality of the work being performed;
- Appropriateness of the level of work;
- Adequacy of priorities
- Effectiveness of communications; and
- Issues, risk, or action items that need resolution

Additionally, the Offeror will manage development of materials for State & Federal Reporting for Integrated Eligibility System Projects and facilitation of all CMS calls and Gate Reviews.

3.4.4 Develop and Manage Contingency Plan for Go-Live for 2016 Open Enrollment

The Offeror shall develop and (if needed) oversee a contingency plan for Go-Live 2016 Open Enrollment that may include manual processes, work-arounds, or technology light options. The contingency plan should be development in coordination of risk assessments and be updated regularly as new risks emerge.

3.4.5 Create and Support inter-agency governance structure and Develop MOU's as needed

The Offeror shall develop a plan for inter-agency structure of NMHIX, HSD, OSI and other state and federal agencies (or other partners as needed). This will include development of MOU's as needed.

3.4.6 Facilitate Workgroups

The Offeror will provide expert facilitation of requirements gathering workgroups or other workgroups, as required.

The Offeror will use best facilitation practices, in either NMHIX or other provided space, as required, including the efficient use of the time of the participants. The Offeror will document all facilitated sessions and record and Phase action items. Minutes of these sessions will be provided within two days after completion of the workgroup.

3.4.7 National Human Services Interoperability Architecture (NHSIA) Self-Assessment (SS-A)

The Offeror will be required to complete a NHSIA State Self-Assessment.

3.4.8 Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A)

The Offeror will be required to complete Medicaid Information Technology Architecture (MITA) Self-Assessment.

3.5

Business Process Development

3.5.1 Perform audit/inventory of all Business Processes, Workflows and Policies & Procedures

The Offeror will perform an audit/inventory of all business processes, workflows and policies and procedures and will develop a comprehensive inventory of needed business processes, workflows and policies and procedures.

3.5.2 Create and deliver Level 1 and Level 3 business process flows

The Offeror will deliver Level 1 and Level 3 business process flows for all needed processes identified in delivery of 3.5.1. Will also update business processes as needed throughout project.

3.5.3 Perform Gap Analysis and work to close these gaps

The Offeror will perform initial and ongoing Gap Analyses as required and document the analysis and findings, including recommendations for realignment of requirements for HIX solution and/or NMHIX processes and procedures.

The Offeror will identify the mission tasks, conditions and standards that are applicable to NMHIX; assess how well current and programmed capabilities support assigned missions; and identify possible solutions to shortcomings in mission performance.

Based on the analysis, the Offeror will make recommendations for realignment or restructure of functional areas/capabilities, where needed. The documentation and recommendations will often be in the form of Memorandums, White Papers or Briefings for decision.

3.6 Requirements Management

3.6.1 Track and Manage Requirements and other required artifacts through go-live

The Offeror will develop accurate and complete requirements sets, following NMHIX -approved project management approach, plan and timeline developed including creating and maintaining a Requirement Traceability Matrix (RTM).

The Offeror will also be required to do the following list activities:

- Review and Analyze Technical Requirements
- Evaluate existing technology environment
- Review and analyze Business Requirements

- Review and Analyze Database Requirements
- Complete Data Dictionary
- Manage Security & Privacy Requirements
- Evaluate, Test and Validate Security and Privacy Technical Requirements
- Develop Master File & Data Transfer (Interface)
- Develop File Transfer Interface Mapping
- Provide Interface Connectivity Document
- Provide Interface Security Validation

The Offeror will provide the facilitation, research, analysis and documentation necessary to deliver the requirements set. In the performance of this task the Offeror will collaborate with all necessary project contractor resources, especially with other project resources, who will provide a major portion of the deliverables for the requirements set. Other collaboration will include the other State of New Mexico agencies (including but not limited to HSD, OSI), other States as well as Federal agencies (e.g. CCIIO, CMS). The Offeror will be responsible for documenting the complete requirements set following NMHIX guidelines.

The Offeror will perform quality assurance (QA) review of the requirements set, following the NMHIX - approved QA Guidelines and Criteria. The Offeror will coordinate a review of the requirements sets among major stakeholders, such as the NMHIX, HSD, OSI, and others, adjudicate comments, and prepare the final package to be submitted for approval.

The Offeror will use industry best practices in writing requirements and follow NMHIX guidelines in the elicitation, development and documentation of requirements in the performance of this task.

3.6.2 Manage HIX Functional Requirements

One of the primary functions of the project is to lead the functional community in the development of a comprehensive set of requirements for HIX solution that clearly describe the functional need or problem. This requirement may include the identification of new business processes, new policies, migration from the Federal, and desired user interfaces with the IT solution.

NMHIX desires to develop complete and accurate requirements sets, which can be understood by the functional community and the technical community. These requirements sets should meet the NMHIX's costing and testing guidelines. They may identify alternative solutions that clearly describe the business impacts and benefits of each alternative. If alternatives are presented, they must be accompanied by clear information so NMHIX and NMHIX Board members can understand and decide among the alternatives.

The requirements sets will also include appropriate architectural documents. These architectural documents will be developed by vendors and are NOT a deliverable under this Scope of Work. However, performance of this task will require the Offeror to collaborate with the other vendors and NMHIX staff to develop complete requirements sets. The Offeror will collaborate with these other Offeror throughout this task starting with the development of the Project Plan.

NMHIX expects these requirements sets will be developed in an efficient and timely manner using industry best practices, while following State as well as Federal (CCIIO and CMS) guidelines.

The goal of this task is to:

- Scope, plan and efficiently manage all project requirements;
- Develop complete, accurate and well documented requirements packages following State of New Mexico and Federal (CCIIO and CMS) guidelines, meeting quality criteria;
- Develop and maintain a requirements collection and implementation process with a traceability matrix;
- Provide expert facilitation of workgroups;
- Develop briefing materials that facilitate decision making;
- Collaborate with other parties as necessary to successfully complete this task;
- Work closely with NMHIX and solution vendor to determine required stakeholder workgroups and expertise to include helping facilitate workgroup meetings, capture minutes and action items and track through resolution.

The Offeror will use generally accepted measurement and analysis techniques and tools in the performance of this task.

3.6.3 Manage the Receipt, Analysis, Validation, Prioritization & Customer Feedback for all Submissions

The Offeror will manage project Change Requests process by:

- Reviewing the current process and continually recommending improvements to NMHIX;
- Prioritize all change requests;
- Analyzing submissions for uniqueness and clarity, and presenting for functional validation and prioritization;
- Documenting the process and status of change request throughout their lifecycle; and
- Providing customer feedback during all phases of the process.

3.6.4 Develop Decision Briefings

The Offeror will develop reporting that clearly describes the requirements set in an appropriate level of detail for NMHIX stakeholders and the Board to understand the functional area/capability being supported by the HIX solution, the alternatives and their business impacts

and benefits, and the implications to the users and NMHIX approval of the requirements set and/or alternatives.

The Offeror will assist NMHIX as required in presenting the briefings for decision. In performance of this task, the Offeror will provide the appropriate level of analysis, synthesis, and documentation required for senior leaders to make informed decisions.

The Offeror will demonstrate an example of its methodology to obtain, research, and analyze articles, reports and other information sources relating to the most up-to-date industry standards in the requirements management process.

3.7 Oversee System Design

The Offeror will be responsible for overseeing the integrated system design including Managing and validating the systems design, Establish DSD Template, Oversee DSD development, Review Integrators' DSDs for Requirements Compliance, Oversee TARC Review, Complete a UAT Test Plan for payment.

3.8 Oversee System Development

The Offeror will be responsible for overseeing the integrated system development including oversight of Systems Integrator's Software Build and Unit Testing, Oversight of Systems Network Build, oversight of Systems hardware and servers' build, complete systems development code reviews and verify successful completion of all System Development activities

3.8.1 Manage Scope for each Release during Development

For each Release in the Development phase, the Offeror will manage and document the scope of each Release. The scope will include the identification of the functional area /capability and tie scope descriptions to requirements. The Offeror will assist NMHIX, as required, in obtaining approval of project Releases. The Offeror will have excellent writing skills in the performance of this task.

3.9 Oversee System Implementation

Offeror will be required to Manage Systems Implementations including confirm Systems Support Plans are in Operations, manage Business Continuity (BC) and Disaster Recovery (DR) Plans and complete Implementation Reviews.

3.9.1 Training

The Offeror will be required to oversee the development and implementation of a system training plan.

3.9.2 System Testing

The Offeror will be required to manage and perform Project UAT and End-to-End Testing. This includes development and management of Test Schedule, Complete Test Modelling, Review Test Plans, Manage User Acceptance Testing, Manage Testing of all Change Requests (CRs) and QA, Complete Test Coordination, Complete Requirement Validation Manage Testing Issues and Errors, Complete Global Testing Reports, Manage Systems Pilot Testing, Complete Production Rollout Systems Testing, Complete a Test Results Summary Report; and Complete a Systems Transition Plan.

3.9.3 Manage Systems Certification for Go-Live

The Offeror will be responsible for certification of integrated eligibility and enrollment system before system go-live. This will include creating Systems Certification Plan, Monitoring Systems Certification Progress, Conducting Mock Reviews, creating a review participation guide and conduct a walk-through of the on-site visits before certifying.

3.10 RFP Development and Procurement Support

The Offeror will be asked to support procurement for other vendor needs for projects. This could include up to five separate procurements for services such as call center support, Testing, Systems Integration, and Privacy & Security.

The Offeror will be required to demonstrate understanding of procurement planning, contracts planning, authoring solicitations, evaluation, requesting solicitation responses, selecting Vendor(s), administering contract(s), and contract(s) closing activities.

3.11 Data Migration & Clean up

The Offeror will develop and oversee a plan for migrating data into and within the NMHIX/HSD integrated eligibility system. This could include migrating data from the Federally Facilitated Marketplace (FFM), New Mexico carrier data, identity data and establishing and possibly overseeing a manual data migration process. Perform initial and ongoing Capability Gap Analyses as required and document the analysis and findings, including recommendations for realignment of requirements for HIX solution and/or NMHIX processes and procedures.

3.12 Call Center Operating Model

The Offeror will be responsible for reviewing and validating developing an operating model for the NMHIX Call Center as required by CMS. This should include options for cost allocation with other state agencies or SBMs, FFM or other partners as appropriate. Offeror should have experience with developing call center models for SBMs.

3.13 Project Closeout

The Offeror will be required to manage Project Closeouts as sub-projects are closed.

3.14 Optional Staff Support

The Offeror may be asked to provide Staff Support as needed to supplement other projects. Offerors are asked to provide standard government rate card as part of cost proposal to be used for Optional Staff Support needs.

3.15 Develop Cost Allocation Plan

The Offeror will develop a recommendation for cost allocation options between NMHIX, HSD, OSI, CMS, other SBMs or other parties as appropriate. This would include things like call center, technology, hosting, physical space, staffing, and other items.

3.16 Provide support for Financial Sustainability plan

The Offeror will provide data and support for NMHIX financial sustainability plan as needed.

4 RFP Deliverables and Content of Proposals

4.0 RFP Deliverables

Submit an original and five (5) hard copies of the Technical Proposal. The original of the Proposal must be signed in ink by an authorized member of the Offeror. In addition, each Offeror 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.

Provide five (5) copies of the Price Proposal in a separately sealed envelope clearly marked on the outside “Price Proposal” along with the Offeror’s name. An electronic copy of the Price Proposal shall be included in the envelope.

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

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

4.1 Proposal Contents

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

4.1.1 Cover Letter

Provide a cover letter identifying the main contact person for the Proposal, any subcontractors, and your eligibility as an Offeror to this RFP. In the Cover Letter, the Offeror 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.

4.1.2 Company Qualifications and Experience

Please provide the following for Offeror and any proposed sub-contractors.

- Describe the Offeror’s form of business, physical locations, number of employees, and annual billings.
- Provide a brief, descriptive statement describing the Offeror’s ability to deliver the services sought under this RFP. Please tailor this section to cover broad experience relevant to the scope of work, and Medicaid/Exchange Integrated Eligibility System implementation and implementation of State Based Marketplace per Affordable Care Act (ACA).

- Describe any clients that Offeror 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 Affordable Care Act.
- Provide information for the past ten years related to: (1) any sanctions or discipline issued against any of the Offeror's employees, partners, or managers; (2) any notices of defaults, damages, debarment, or other penalties incurred by the Offeror 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 Offeror or its employees, partners, or managers have been a party.

4.1.3 Personnel Qualifications and Experience

Provide a list and biographical, experience and qualifications of key personnel, including all proposed subcontractors.

Please also identify roles for each team member proposed.

4.1.4 References

Provide a comprehensive list of projects similar in scope and size, any 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 under this RFP. The reference must include contact name, company, physical address, telephone number, email address, length of contract, and length of time that the account has been a reference.

4.1.5 Approach to Scope of Work

Address the Scope of Work in section 3 and describe how your solution will address each of the sections outlined in Section 3: Scope of Work. This section of your Proposal should follow the organizational structure and order of 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.

4.1.6 Project Timeline

The Offerer is required to provide a detailed timeline addressing key milestones in Scope of Work over the initial contract term of January, 2015 – December 31, 2015.

4.1.7 Detailed Price Proposal

Provide a Price Proposal for completing all tasks included in the scope of work. A cost proposal template has been included as **Attachment A: PMO Cost Proposal Template**. Offeror may choose to add additional line items and detail to **Attachment A: PMO Cost Proposal Template**.

The price proposal must be inclusive of all taxes, travel expenses, materials, and print. 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.

The Offeror must propose a fixed price contract as well as a rate card to address Optional Support Staff as outlined in Section 3.14 of Scope of Work.

5 Proposal Evaluation

The below sections describe the expected evaluation process.

5.0 Proposal Evaluation Logistics

5.0.1 Evaluation Schedule

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

Event	Date
Issuance of RFP	Friday, December 05, 2014
Deadline to Submit Questions & Intent to Respond 5:00 PM MST	Tuesday, December 09, 2014, 5:00 PM MST
Response to Written Questions/RFP Amendments	Friday, December 12, 2014
Submission of Proposal (3 pm MST)	Thursday, December 18, 2014 3 PM MST
Proposal Evaluation	Tuesday, December 23, 2014
Vendor Interview Notifications	Wednesday, December 24, 2014
Vendor Interviews	Tuesday, December 30, 2014
Best and Final Offers Due	Friday, January 02, 2015
Anticipated Award Announcement	Friday, January 09, 2015

Certain Offerors selected by the Evaluation Committee may be asked to participate in oral interviews related to their proposed solutions. This process is intended to allow Offerors 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 Offeror.

Offerors are asked are asked to hold December 30th open for potential onsite interviews. The NMHIX will alert vendors of the final dates and arrangements as soon as possible.

Following onsite interviews, Offerors will be asked to present Best and Final Offers (BAFO) to NMHIX. Included with the BAFO, Offerors will be asked to provide draft scope of work document and deliverables list to tie to vendor payments of successful Offeror.

The selected Offerer will be asked to **begin working immediately** after signing a contract.

5.1 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 Offeror will be notified of the Intent to Award the contract to that Offeror.

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 Offerors.

5.2 Evaluation Criteria

REQUIREMENT AREA	EVALUATION WEIGHT
Company Qualifications	Pass/Fail
Staff Qualifications and Experience Implementing State Based Marketplace	50%
Understanding and Approach	30%
Cost	20%

4 Attachment A – PMO Cost Proposal Template

Please see provided Excel document labeled “NMHIX PMO Cost Proposal Template”

5 Attachment B – Sample Contract