



NEW MEXICO HEALTH INSURANCE EXCHANGE

Request for Proposals

- **Advertising & Marketing Assistance, Educational Content, & Public Relations Services**

Issued: June 18, 2013
Submission Date July 3, 2013

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1. Introduction and Overview

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 Martinez signed the Act on March 28, 2013. The New Mexico Health Insurance Exchange (the “Exchange”) is created as a nonprofit public corporation (501(c)4).

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.

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 as a Hybrid model in 2014 and a State based Exchange in 2015; the Exchange will create the SHOP for small business and will use the Federal platform to enroll individuals until the state-run individual Exchange system is ready to begin enrolling consumers in 2014 for coverage beginning January 1, 2015.

New Mexico has a high rate of uninsured, about 23%; health workforce shortages, language, cultural barriers, significant poverty, poor educational attainment, and a significant number of its small businesses do not offer health insurance to employees. Of New Mexico’s population of two million, Medicaid covers 560,000 individuals; Medicare covers 300,000 and 430,000 are uninsured. Of the uninsured, an estimated additional 175,000 may become eligible for Medicaid and up to 211,433 for the Exchange between 2014 and 2020. An estimated 171,557 uninsured will enroll in 2014; approximately 89,000 through Medicaid expansion, and 82,557 in the Exchange.

The exchange is working to secure Level I federal grant funding that is available to fund marketing and outreach activities in 2013 and 2014. The Exchange will operate as a Hybrid Model Exchange, meaning that the state exchange is responsible for all marketing and education efforts, as well as for the operation of the SHOP website designed for small businesses, while the federal government’s exchange is responsible for the operation of the website that enrolls individuals. Open enrollment is expected to start on October 1, 2013 and continue through March 31, 2014. The effective start date of coverage for consumers who enroll in a plan prior to mid-December is January 1, 2014. Later in 2014, the state will stand up its own website for enrolling individuals, and start operating as a full state-based Exchange.

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2. Purpose of Request for Proposal

The Exchange is seeking advertising and marketing, educational content, and public relations services from experienced contractors and potential subcontractors for the purpose of designing and implementing a comprehensive advertising and marketing health insurance exchange campaign aimed at reaching uninsured and insured individuals and small employer populations that will be impacted by health care reform. The purpose of this campaign is to educate these populations on the availability and benefits of health insurance to be offered through the Exchange beginning on January 1, 2014.

The successful bidder will provide branding, messaging, creative advertising, media buying services, informational website design, search engine optimization, and social media communications, as well as video production and graphic design support services.

The successful bidder will create educational content regarding the practical impact of health reform in New Mexico for individuals, small businesses and large employers. This will include, but not be limited to, information about eligibility and enrollment, tax credits, and general health coverage options. Special Native American emphasis will be required to address the multiplicity of tribes and cultures represented by the Navajo, Pueblo and Apache in New Mexico.

The successful bidder will design and implement a comprehensive advertising and public relations campaign to educate eligible population segments, small employers, and the general public about the Exchange. See Appendix A – Value Proposition – for initial key concepts for messaging.

Bidders should clearly identify any subcontractors contemplated under this proposal.

3. Procurement Manager

The Exchange is issuing this Request for Proposal (RFP). The procurement manager is the sole point of contact regarding this RFP. No contact with any Exchange Board Members, any New Mexico Health Insurance Exchange employee, vendor, or consultant with respect to this RFP is permitted, from the date of release of this RFP until a contract is awarded, unless otherwise directed by the procurement manager.

The procurement manager for this RFP is:

Mike Nunez
Interim CEO
New Mexico Health Insurance Exchange
506 Agua Fria Street
Santa Fe, NM 87501
505-998-1600 Ext 1012
Email: mnunez@nmhia.com and staffadmin@nmhia.com

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Please submit questions in writing to the email address above prior to June 24, 2013. Responses to all questions will be made available to all respondents. This RFP is not subject to the New Mexico Procurement Code.

4. Contract Period and Terms and Conditions

The initial term of the contract shall be for a period beginning July 15, 2013 through December 31, 2014. The Exchange may, at its sole discretion, seek to extend the contract for additional time periods.

The Exchange will enter into a written contract with the winning respondent consistent with the terms of this RFP and the winning bidder's proposal.

The contract will incorporate provisions from the Exchange's Standard Terms and Conditions for contracts for services, insofar as applicable. A copy of the Exchange's Standard Terms and Conditions can be found at www.nmhia.com/nmhix/NMstandardcontract.pdf.

5. Scope of Work

All materials developed under this agreement will be copyrighted to the Exchange.

A. Advertising and Marketing Phase 1 – July-September 2013

Task 1 - Branding, Messaging and Marketing Strategy Development

- Propose a dynamic, phased-in marketing strategies approach, timeline and work plan.
- Analyze audience segments and research targeted messaging options.
- Review communication plans and materials from other states.
- Develop core messages for the general public, and for small employers in English, Spanish, and Navajo.
- Propose branding options to Exchange board and interested stakeholder representatives.
- Develop a brand name, tag line, logo and a web address for New Mexico's Exchange.
- Develop templates including; newsletter, letterhead, business cards.
- Develop a style guide including terminology to be applied to all Exchange documents & communications.

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Task 2 - Establish a web presence for the New Mexico Health Insurance Exchange

- Develop landing pages, introductions and links to external resources for individuals and employers.
- Write and produce introduction-level videos.
- Establish a social media identity.
- Collect and categorize contacts for opt-in newsletters.
- Collect and report web analytics.

Task 3 - Measure public awareness and perceptions regarding the Exchange

Task 4 - Launch a general awareness/teaser advertising campaign

Phase 2 – October 2013-March 2014

Task 5 - Launch a full-fledged marketing campaign during open enrollment

- Develop advertising that is a call to action for potential enrollees, small employers and the community.
- Develop targeted messages using a variety of vehicles and accommodating diverse abilities, situations and cultural backgrounds.
- Monitor enrollment successes and problems for each segment, adapt accordingly.

Task 6 - Validate and refresh the approach

- Measure public awareness and perceptions in December.
- Evaluate ROI of different media buys.
- Reframe messages and refresh the media for the January-March period.

B. Educational Content - July 2013 - December 2014

1. Produce educational materials in a variety of formats for audiences interested in getting detailed information about the Exchange, tax credits, the practical impact of healthcare reform on individuals and businesses, and general health coverage options.

We recognize that the time frames for the initial launch of the Exchange are extremely tight. However, over the life of the contract, we expect the successful bidder to utilize a rigorous, evidence-based process for developing educational content that includes:

- Identifying the goals for each distinct set of content;
- Defining the target audiences, their characteristics and issues;
- Developing and testing materials;

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 - Distributing the materials;
 - Assessing the effectiveness of the materials; and
 - Using feedback to make further improvements.

The Exchange expects to contract with its Project Management vendor or another chosen vendor to provide training materials and documentation that will be used by Customer Service partners such as Assistants/Navigators, Brokers and the Call Center. Those activities fall outside the scope of this RFP. However, it is expected that some of the materials developed under this contract, and listed below, will be used by our Customer Service partners. They should appropriately be considered a target audience for these materials.

2. Bidder will:

- Develop explanatory materials that will be made directly available to the public on the web site, or distributed to individuals or employers by our Customer Service and assistants, navigators or agents;
- Develop of materials that will be used to recruit and guide assistants, navigators and providers, e.g. health care providers, health and social workers, caregivers, community and faith-based organizations, small business lawyers, bankers and accountants, chambers of commerce, etc.;
- Develop materials that answer general questions and concerns from others in the community, e.g. large employers that do not qualify for the Exchange.
- Review the very large cache of shareable materials that have already been developed by other state Exchanges, federal government agencies, other state agencies, insurance carriers, and some stakeholder groups;
 - Quickly prioritize and select the best and most widely applicable existing materials;
 - Work in close collaboration with Exchange staff, contractors and stakeholders to ensure that all materials are appropriate for New Mexico, specifically:
 - That they are consistent with the rules, systems and business processes of New Mexico's Exchange, Customer Service partners, HSD and insurance carriers;
 - That they are reflective and respectful of the state's cultural, economic, geographic and Native American diversity;
 - Modify existing materials as needed for consistency with the Exchange's branding, style guide and common terminology;
- Review questions asked by users and stakeholders, that are collected through public input, customer service interactions, and user feedback to incorporate the answers into the educational materials;
- When questions are not already addressed in ready-made materials, look for answers in the training materials provided to Customer Service; if not there,

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ask the Exchange Staff and Project Management vendor for a resolution; then translate the answer so it is easy for the public to understand;

- Cognitively test and validate materials with stakeholders and focus groups;
- Work with the Exchange eligibility and enrollment website vendor to incorporate educational materials that provide appropriate context for the health plan choice process and enrollment decision support.

C. Public Relations (August 2013 - December 2014)

- Develop a coordinated Public Relations Strategy, to educate eligible New Mexicans and small employers about the Exchange.
- Work with statewide media to secure positive coverage of the exchange.
- Promote and help organize grass-roots efforts and public-education events through press releases and advisories.
- Establish an editorial calendar for editorial board visits about the exchange.
- Execute earned media events around the state.
- Help grass-roots effort make connections to opinion leaders in communities.
- Continually draft and place op-eds and Letters to the Editor on the Exchange.
- Continually work to secure radio and television interviews for NMHIX staff and board throughout the state.
- Provide a weekly report to the Exchange staff on activities and measurements to appropriately adjust strategy.
- Assist guidance of crisis and negative publicity management via appropriate public relations advice and leadership.

The successful bidder will:

- Report to the Exchange's Communications Director or the CEO;
- Coordinate an initial kickoff meeting will be held on site with staff, stakeholders and partner organizations;
- Provide weekly written status reports; and
- Attend other meetings, make presentations and participate in teleconferences as requested by the Exchange.

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6. Proposal Submission Process and Deadline

The technical proposal must be no more than 25 pages and must follow the format provided in section VII, with tabbed and numbered sections. Appendix B (Certification and Conflict of Interest Disclosure Form) and the Cost Proposal are not counted in the above 30-page limit.

One proposal with original signatures and ten copies must reach the Procurement Manager's office no later than 5:00 p.m. MDT on July 3, 2013.

Mike Nunez
Interim CEO
New Mexico Health Insurance Exchange
506 Agua Fria Street
Santa Fe, NM 87501

In addition, an electronic submission must be emailed in Microsoft Word or Adobe PDF format by the above date and time to:
mnunez@nmhia.com and staffadmin@nmhia.com;

7. Required Proposal Format

We recognize this RFP includes a relatively short and aggressive response timeline. A simple, straightforward proposal is strongly recommended.

The following information is requested to be in your proposal. It is our intent to select two to three finalists and it is not our intent that the finalist's presentation mirrors the proposal exactly. You have the freedom to make the key points you believe to be most important in your presentation without concern that it does not address all guidelines and requirements. In addition, finalists should be prepared to bring sample creative: Branding, Messaging and Marketing Strategy, Project plan and other items stipulated below under Process/Performance.

8. Working Assumptions

a. Bidders should use the following assumptions about project management and oversight when preparing their proposals.

- 1) Weekly status reports to Exchange;
- 2) Kickoff meeting with designated Exchange employee and stakeholder workgroups;
- 3) Initial interviews with Exchange Marketing Committee and Board members, Executive Director, DOI Superintendent, and Cabinet Secretary for New Mexico Indian Affairs;
- 4) Work collaboratively with NMHIX on PR, Outreach and Educational Content ;

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- 5) Focus group interviews to include small business employers, consumer advocates, carriers, brokers, navigators, and Native American workgroups; and
- 6) Attend other meetings, make presentations and participate in teleconferences as requested by the Exchange.

A. Technical Proposal (30-page limit)

1. Organizational Capabilities/Background (provide similar information for key subcontractors if Applicable)

- 1.1. Company name, address, website
- 1.2. Company history and experience (years in business)
- 1.3. Key Contact name and title including business phone, mobile phone and email address
- 1.4. Company size (by number of employees)
 - 1.4.1.1. Number of Employees in Responding Office
 - 1.4.1.2. Number of Employees Assigned to Exchange Account
- 1.5. Typical client size in annual gross billings
- 1.6. Total agency annualized gross billing
- 1.7. Biographies of key company personnel Exchange would be working with, including account executive and creative team
- 1.8. Up to 3 samples of work including results in brand development, campaigns, or other examples
 - 1.8.1.1. Electronic media process and understanding
 - 1.8.1.2. Business-to-business and Business-to-consumer experience and results delivered
 - 1.8.1.3. Direct marketing experience and results delivered
- 1.9. Three (3) professional company references and 3 client specific references for proposed lead staff members on the Exchange account. The references should be previous clients for whom the individual served for engagements comparable to those outlined in this RFP. Please provide telephone numbers, names, and emails of contact persons
- 1.10. Internal and PPACA resources (e.g. technical staff and capabilities)
- 1.11. Explain what resources and partnerships will be utilized in New Mexico to focus marketing efforts reflecting New Mexico's unique tri-culture population.

2. Insight

- 2.1. Approach to positioning the Exchange
- 2.2. Perspective on segmentation (targeted) versus broad market (mass media) Exchange offers and media strategy in an attempt to inform, educate and persuade
- 2.3. Perspective on educating the New Mexico communities on health insurance

3. Process/Performance (Finalist Presentation)

- 3.1. Prepare to bring sample creative: Branding, Messaging and Marketing Strategy;
- 3.2. Company approach or methodology for brand development and creative execution;

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3.3. Media strategy and processes, including social media and multimedia, including timeline for execution;

3.3.1. Approach for Market Research and Strategic Planning

3.3.2. Approach to Educational Content Development

3.3.3. Approach to Public Relations

3.4. Cultural competency and knowledge of New Mexico rural communities, including approach to assuring cultural and linguistic appropriateness;

B. **Budget/Cost Proposal**

1. The budget proposal should include pricing for all Phases of the Scope of Work. Please use the format below in Section B.2 for submitting your Cost Proposal.

2. Cost Proposal

Hourly Rates

Please provide hourly rates for each type of personnel who will or may be assigned to this project (samples below for illustration purposes). These rates would apply for work performed in 2013 and 2014. Please load the rates to include travel and accommodations, where needed. Project billing will be done on a Time & Materials basis with a Not-To-Exceed cost as defined below.

Personnel Category	Loaded Hourly Rate*
Project lead	
Senior writer	
Junior writer	
Research assistant	
Translation services	
Other (please describe)	

* Hourly rates should include 7% Gross Receipts Tax.

Cost Estimate and Not To Exceed

Please estimate the total cost required to provide the deliverables described in the Scope of Work. The Minimum column represents your best-case, minimum cost scenario, with only high and medium-priority items delivered. The Maximum column represents the most comprehensive, maximum cost scenario. It will be converted into a contractual Not-To-Advertising and Marketing project cost cap.

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<u>Phase 1 – Advertising and Marketing Assistance</u> <u>July-September 2013</u>	Minimum cost	Maximum NTE
<p>Task 1 - Branding, Messaging and Marketing Strategy Development</p> <ul style="list-style-type: none"> • Review communication plans and materials from other states. • Develop a brand name, tag line, logo and a web address for New Mexico’s Exchange. • Develop core messages for the general public, and for small employers. • Develop a style guide including terminology to be applied to all Exchange documents & communications. • Develop templates including; newsletter, letterhead, business cards. • Propose branding options to Exchange board and interested stakeholder representatives. • Analyze audience segments and research targeted messaging options. • Propose a dynamic, phased-in marketing strategies approach and timeline. 		
<p>Task 2 - Establish a web presence</p> <ul style="list-style-type: none"> • Develop landing pages, introductions and links to external resources for individuals and employers. • Write and produce introduction-level videos. • Establish a social media identity. • Collect and categorize contacts for opt-in newsletters. • Collect and report web analytics. 		
<p>Task 3 - Measure public awareness and perceptions regarding the Exchange</p>		
<p>Task 4 - Launch a general awareness/teaser advertising campaign</p>		
<p>Total Cost Advertising and Marketing Assistance Phase I</p>		

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<u>Phase 2 – October 2013-March 2014</u>	Minimum cost	Maximum NTE
<p>Task 5 - Launch a full-fledged marketing campaign during open enrollment</p> <ul style="list-style-type: none"> • Develop advertising that is a call to action for potential enrollees, small employers and the community. • Develop targeted messages using a variety of vehicles and accommodating diverse abilities, situations and cultural backgrounds • Monitor enrollment successes and problems for each segment, adapt accordingly. 		
<p>Task 6 - Validate and refresh the approach</p> <ul style="list-style-type: none"> • Measure public awareness and perceptions in December. • Evaluate ROI of different media buys. • Reframe messages and refresh the media for the January-March period. • 		
Total Advertising and Market Assistance Cost Phase II		
Total Advertising and Market Assistance Cost Phase I and II		

<u>Educational Content – July 2013 - December 2014</u>	Minimum cost	Maximum NTE
<ul style="list-style-type: none"> • Develop explanatory materials to be used on the web site, or distributed by our Customer Service center, assisters, navigators or agents; • Development of informational materials to recruit and guide assisters, navigators and providers, e.g. health care providers, health and social workers, caregivers, community and faith-based organizations, small business lawyers, bankers and accountants, chambers of commerce, etc.; • Develop materials that answer general questions and concerns from others in the community, e.g. large employers that do not qualify for the Exchange. 		
<ul style="list-style-type: none"> • Review shareable materials already developed by other state Exchanges, federal government agencies, 		

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<p>other state agencies, insurance carriers, and some stakeholder groups;</p> <ul style="list-style-type: none"> • Quickly prioritize and select the best and most widely applicable existing materials; • Work in close collaboration with Exchange staff, contractors and stakeholders to ensure that all materials are appropriate for New Mexico, specifically: <ul style="list-style-type: none"> ○ That are consistent with the rules, systems and business processes of New Mexico’s Exchange, Customer Service partners, HSD and insurance carriers; ○ That are reflective and respectful of the state’s cultural, economic, geographic and Native American diversity; ○ Modify existing materials as needed for consistency with the Exchange’s branding, style guide and common terminology; ○ Review questions and feedback from users and stakeholders to incorporate answers into educational materials; ○ Validate communication materials with stakeholders and focus groups, as needed; • 		
<p>Total Educational Content Cost</p>		

Public Relations	Minimum cost	Maximum NTE
<ul style="list-style-type: none"> • Develop a Public Relations Strategy, in coordination with engaged Marketing Firm, Outreach Contractors, and Education and Training contractors, to enhance the Enrollment of eligible New Mexicans and small employers in the Exchange • Work with statewide media to secure accurate coverage of the exchange • Promote and help organize grass-roots efforts and public-education events through press releases, advisories and pitches. • Establish an editorial calendar for articles regarding the exchange. 		

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<ul style="list-style-type: none"> • Execute earned media events around the state. • Help grass-roots effort to educate opinion leaders in communities. • Continually draft and place op-eds and letters to the Editor on the Exchange. • Continually work to secure radio and television interviews for NMHIX staff and board throughout the state. • Provide a weekly report to the Exchange staff on activities and measurements to appropriately adjust strategy. • Assist with minimizing inaccurate or misconstrued publicity management via appropriate public relations advice and leadership. 		
Total Public Relations Cost		

Summary of Proposed Cost	Minimum cost	Maximum NTE
Total Advertising and Market Assistance Cost		
Total Educational Content Cost		
Total Public Relations Cost		
Grand Total All Services		

See Exchange communication philosophies/fundamentals on Appendix A.

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9. Agency Selection Criteria and Weight

Scope: Exchange will look at the capabilities of all agencies submitting bids.

Organizational Capabilities/Background (15%): The agency must have a strong record for creating branding and integrated marketing campaigns that deliver positive results for its clients. This includes meeting specific ROI measurements or other quantitative metrics.

The bidder should have relevant experience in health care or in marketing to the unique needs of our target market populations. Experience in health insurance is desirable but not essential. The Exchange is particularly interested in an agency's experience and success in promoting new market and new category entrants.

Dedicated Account Management and Creative Design Team (20%): Please include bios/resumes for Account Management and Creative design team.

Process/Performance (20%): The agency must have a demonstrable record for creating differentiated, compelling, and focused creative executions. The agency must have the ability to successfully build brand and to reflect the attributes of that brand strategy in its creative executions. Further, the creative executions may require very different executions given the differences of our target populations. Imaginative use of media mix is essential.

Insight and integration (15%): Experience with successful integrated marketing campaigns is essential. An example of how integrated marketing campaigns have succeeded (or failed) is of interest as is how the use of account planning has resulted in specific target market insights which have enhanced brand value. Please provide your vision of how you will manage the integration of the marketing, education and public relations.

References (10%): The quality and appropriateness of professional company and client specific references.

Budget Proposal/Media Planning & Buying (20%): The agency must have deep experience in media planning and buying. Specific experience in customized media plans and ways to leverage media "buys" is highly valued. The agency must have experience with on-line and "new media" marketing strategies and tactics. Search engine marketing, including "pay-per-click" and landing page development is essential. Either in-house functionality or relationships with external, specialized vendors is required.

Finalists will be placed in an unranked pool prior to interviews.

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10. Timeline

The Exchange staff will review the proposals during the week of July 3, 2013 and conduct preliminary clarifying telephone calls and references checks with a subset of respondents that week. Two to three finalists will be selected and finalists should be prepared to bring sample creative as indicated above. The finalists should be prepared to present and be interviewed by a selected team and should set aside time for 90 minutes on July 12, 2013. The selection of an advertising and marketing firm will be made the week of July 15.

Initiative	Date
Release of RFP	6/18/2013
Contractor questions submitted	6/24/2013
Responses to Contractor questions	6/27/2013
Submission of RFP	7/3/2013
Evaluation of RFP	7/5-10/2013
Finalist Presentations and Interviews	7/12/2013
Contract Negotiations	Week of July 15
Award of Contract	Week of July 15
Services Commence	Week of July 15

Dates are subject to change as the discretion of the Evaluation Committee

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Appendix A

Overview of the Exchange's value proposition

Consistent with its mission, the Exchange offers several improvements over the pre-ACA health insurance marketplace that could be communicated to the public. The following list is neither complete, nor prescribed. Vendors are expected to review a variety of Exchange materials and communication plans from other states to develop a strategy as well as sets of tactical messages to be delivered over time.

- “More affordable”
 - We make health insurance more affordable for low-to-medium-income individuals and families thanks to federal tax credits.
 - Our plans also include reduced copays and deductibles (cost sharing) for low-income individuals and families.
 - We offer several levels of cost sharing that allow medium-to-higher-income buyers to choose either lower monthly premiums, or lower out-of-pocket medical costs.
 - Thanks to the open market competition that happens in the Exchange, our insurance rates are as low as they can be.
- “More choice”
 - More insurance companies will be participating in the Exchange, than in the current individual market.
 - Buyers will be able to choose a plan that gives them access to their preferred hospital and to their favorite health care providers.
- “More protection”
 - All our plans are certified by the State Superintendent of Insurance to meet newly raised federal and state requirements regarding essential benefits and consumer protections.
 - No one will be turned down, or have their insurance cost raised because of their medical problems.
- “Better for small businesses”
 - Some small businesses who participate in the Exchange will qualify for tax credits.
 - Currently, small businesses whose employees had medical problems may be charged up to 50% higher premiums than businesses with no medical problems. This will no longer happen in the Exchange.
- “More help”
 - We are here to educate people on available coverage in the Exchange and to help make it easy.
 - We will have an easy-to-use web site where consumers can do side-by-side comparison shopping for insurance.

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 - We will have local insurance brokers, customer service on the phone, and community-based partners around the state, who will help people understand their coverage options, answer questions, and help them sign up.

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Appendix B

Certification and Conflict of Interest Disclosure Form

This is to certify that the undersigned has carefully read the specifications contained in the Request for Proposals (RFP) issued by the New Mexico Health Insurance Exchange and that the proposal transmitted herein is in accordance with all of the information contained in the RFP. The undersigned bidder also certifies that it has listed and identified any and all organizations which may subsequently respond to an RFP issued by the Exchange -- for whom the Contractor has performed work related to the contents of this RFP. The bidder should provide the Exchange, as part of the bidder's response to this RFP, with as much information as possible about the nature of any potential conflicts.

Firm Name: _____

Name of Authorized Representative: _____

Signature: _____

Email: _____