



NEW MEXICO HEALTH INSURANCE EXCHANGE

Request for Proposals
Call Center Services

Issued: August 16, 2013
Submission Date: August 26, 2013

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Call Center Services

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I. 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 (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 be 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 Exchange system is ready to enroll consumers in 2015.

Currently New Mexico has a high rate (~23%) of uninsured; health workforce shortages, language and 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 550,000 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 has secured Level I federal grant funding that is available to pay for 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 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.

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Later in 2014, the state will stand up its own website for enrolling individuals, and start operating as a full state-based Exchange.

II. Purpose of Request for Proposal

Starting during the Open Enrollment Period, which begins October 1, 2013, New Mexicans will likely have questions about health care reform and the health insurance options that are available to them. The Exchange is required to operate a toll-free hotline for residents to call to assist with their questions and enrollment in coverage.

The Exchange is seeking Call Center Services from an experienced contractor (and potential subcontractors) for the purpose of designing and implementing a Call Center that will handle all calls that come in through the NM HIX's toll-free number. The purpose of this Call Center will be to take incoming calls and connect the callers to potentially one of six entities:

1. The NM Medicaid program's call center(s) for Medicaid-related calls (assistance and/or complaints);
2. The contracted Healthcare Guide Entities and/or certified Healthcare Guides for individuals looking for assistance enrolling in an individual qualified health plan through the Federally Facilitated Exchange (FFE);
3. The FFE's call center for technical issues related to the FFE (assistance and/or complaints);
4. The Health Insurance Exchange's office for small business and/or SHOP calls (assistance and/or complaints);
5. Referrals to Brokers and Agents, as requested or,
6. Carriers, for questions related to benefits or provider networks.

In Appendix B the Exchange provides a Call Center model that it would like to see included in your proposal, called the New Mexico First Model. Below is a brief description of the scenario:

New Mexico First Model

As the name suggests, the New Mexico First model is envisioned to direct callers to New Mexico based entities. The Exchange expects the calls to be answered by a call center representative (CSR). A set of questions shall lead the Call Center down a decision-tree logic that directs the caller to potentially six different entities (see Appendix B): the SHOP office, Agents or Brokers, In-Person Assisters, New Mexico Medicaid, Carriers, or the Federal Call Center. The Exchange expects this model to transfer calls to these

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different destinations, rather than simply providing a telephone number. The Exchange requires warm transfers to be used. The Exchange understands that given the current timeframe, live transfers may not be fully operational on October 1, but the Exchange is interested in hearing how your bid can accomplish this within a reasonable timeframe.

The successful bidder will demonstrate the:

- Capacity to scale and/or retract its operations as necessary to achieve an optimal level of service that is cost effective;
- Ability to handle all types of calls included in this proposal;
- Experience to implement this Call Center within the given timeframes;
- Technology to report to NM HIX the requested metrics; and,
- Experience to recommend to the NM HIX ways to offer the best value and cost for the proposed model.

The successful bidder will design and implement a Call Center that will be fully operational by October 1, 2013, with the technology and staffing capabilities and expertise to expand as a) volume dictates and b) as the NM HIX begins to implement the individual marketplace for January 1, 2015. The focus will be on the Contractor's ability to design and implement a Call Center within this period of time, with a secondary focus on the Contractor's capabilities to expand as the NM HIX expands over time.

Bidders should clearly identify any subcontractors contemplated under this proposal.

The Exchange is looking for Call Center Services options to the New Mexico First Model, found in Appendices B. **Based on best practices and cases studies, please provide your recommendations for implementing and operating a Call Center that provides cost efficiencies and a superlative customer experience designed to meet immediate and future needs. Please be specific about the telephony requirements, staffing levels, methods to distribute and respond to calls, training, and quality assurance.** Again, the Exchange is open to alternative models if they promote efficiency and effectiveness.

III. 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.

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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

This RFP is not subject to the New Mexico Procurement Code.

IV. Contract Period and Terms and Conditions

The initial term of the contract shall be for a period beginning September 6, 2013 through December 31, 2014. The Exchange may, at its sole discretion, seek to extend the contract for additional time periods. Please note that this call center solution is intended to support the Exchange during the initial open enrollment phase to a time when a longer term call center solution can be implemented, which is anticipated to be mid-2014. The Contractor for this immediate call center solution will be strongly considered as the Exchange procures its longer term call center solution.

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.

V. Scope of Work

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

A. Call Center Start-Up and Operational Requirements

This section describes the requirements for the start-up and operations of the Call Center, which include the following:

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1. The Call Center shall be available to receive and respond to inbound calls Monday through Friday from 7:00a.m. to 7:00 p.m. Mountain Standard Time (MT). The Exchange would like to see budget options for a 7-day-a-week availability, as well, during these same business hours. Lastly, the Exchange would also like to see budget options for a call center open 24 hours a day, seven days a week. This last option, if chosen, would be for the first three months of the contract (October through December), with the possibility of extension into future months
2. The Call Center shall comply with all requirements of the ACA and its related regulations.
3. The Call Center must be fully operational and ready to accept inbound calls beginning on October 1, 2013. The Contractor shall work to refine and improve the Call Center thereafter.
4. The Exchange requires live call center representatives. During non-business hours, however, the Exchange expects a messaging service (or IVR) to be available to deliver helpful information.
5. The Exchange requires *warm transfers* to destination entities, when possible. The Exchange will work with the Contractor to finalize call destination work flows.
6. The Call Center shall maintain a highly trained staff of Call Center Representatives (“CSR”), as is necessary to implement the Call Center model that the Contractor proposes. The Exchange requires that the CSRs be based in New Mexico. There is an option to have the CSR sit at the Exchange’s offices, and so the Contractor should consider this in its pricing proposal.
7. The Call Center shall provide high-quality customer service, focusing on the accuracy of information provided, the completeness of information, adherence to privacy laws, and overall professional customer service.
8. The Call Center shall ensure low queue times, abandonment rates less than 3% on a monthly basis, and no disruption in service due to insufficient capacity.
9. The Call Center shall provide quality assurance survey tools to monitor caller satisfaction. The Contractor shall work with the Exchange to design the details of this survey tool.

At start-up, the Contractor shall support inbound calls in both English and Spanish. The Contractor shall establish and operate a third party translation service that supports multiple languages. Strong consideration will be given to Contractors able to support additional languages common in New Mexico.

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The Contractor must ensure that there are technologies and processes in place that are sensitive to, and capable of, addressing the special needs of callers including TTY or relay services to support individuals with hearing impairments.

The Contractor shall maintain communication with the Exchange CEO and directors, as identified by the Exchange, to ensure that the Exchange maintains a high-level of visibility into all operations.

The Contractor shall be proactive when notifying the Exchange of any developing situation that may impact operations, service to callers, or any other contractual issue.

The Contractor shall determine the appropriate staffing, technical and telephonic systems, and physical location for the Call Center. The Contractor shall utilize the most efficient operations and work assignments to maximize the use of CSR staff during low inbound call volume periods.

The Contractor shall use best practices, standards, and methodologies to provide individuals with quality service. The Exchange recommends that the Contractor standards be aligned with a best practice standard such as International Standards Organization (ISO) or the Customer Operations Performance Center (COPC), or have received ISO and/or COPC 2000 certification.

The Contractor shall work with the Exchange to calibrate call length and quality to a mutually acceptable standard, on a monthly basis.

The Exchange requires warm transfers to the different destinations, rather than simply providing another telephone number to call.

The Exchange requires that the Contractor be able to meet the uncertain and variable call center volume needs. Current estimates are between 150-500 calls per day, on average, over the course of the year. The Exchange expects call volume to potentially be significantly higher than this during the initial open enrollment period. The Exchange expects the Contractor to have call center capacity to ensure all calls are answered within the service level agreement standards laid out later in this RFP. This includes an expectation that the Contractor shall have access to additional call center staff at other locations to assist with high-volume days.

In the proposal, the Contractor is required to describe the approach to providing services and the practices, standards, and methodologies that support such services. Contractors are required to describe in detail how they will objectively measure their performance.

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A.1. Call Referrals

The Call Center will accept all incoming calls and route them to the appropriate entity. The Exchange’s expectation is that the Call Center will provide services necessary to determine the purpose of the call and then determine the proper recipient for the caller. During start-up and implementation, the Call Center is not expected to answer ACA-related questions.

The Contractor must propose the method by which it proposes to determine the proper contact recipient for the caller. Proposed questions can be included in your proposal. Expected inquiry types include:

Expected Caller	External Entity	Entity Established
Individual with questions and/or complaints about Medicaid	New Mexico Medicaid Program Call Center	Yes
Individual with questions and/or complaints about eligibility for state or federal programs	Exchange-contracted Healthcare Guide Entities	TBD
Small businesses, agents, or brokers with questions and/or complaints about SHOP	New Mexico Health Insurance Exchange SHOP Office	Yes
Individual with questions and/or complaints about the FFE	Federally Facilitated Exchange Call Center	Yes

A.2. Key Personnel

Key personnel are defined as personnel critical to ensuring that operations are successful, performance metrics are met, and customer service standards are adhered to. The Contractor shall identify additional Key Personnel that are necessary to fulfill the requirements of this contract. These positions may include Project Manager, Operations Manager/Supervisor, Security Manager, Workforce Manager, etc. Given the short timeframe for implementation the Exchange believes that at least 2 dedicated leaders of the Contractor’s organization will be needed. The Exchange strongly prefers that at least one key personnel is identified in addition to the Project Manager. Proposals shall include an organizational chart that shows the key personnel to be used in the implementation and operational phases.

Key Personnel may be assigned to more than one functional task, but Contractors must specify what percentages of their time will be spent in what roles. **Wherever possible,**

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proposals shall identify the specific individuals who will serve as Key Personnel, and attach resumes and references.

A.3. Telecommunications and Technology Support

The Contractor shall provide telecommunications and technology support for desktop usage, desktop support, telecommunications and technology systems, voice and data network equipment, hardware and software support. **As part of the proposal, the Contractor shall provide a telecommunications network and systems plan that outlines the approach and processes that will be used to implement and manage the Call Center.**

The contractor's solution shall include the ability to track all inbound calls and route them to the appropriate agent.

All equipment and systems shall be configured for CSR day-1 use, if CSRs are included in the proposal. Support shall be available to CSRs to assist with equipment or systems issues.

The Contractor shall provide necessary staff to maintain voice and data networking equipment, and must be available if necessary to troubleshoot problems.

The Contractor shall provide a solution for tracking the date and time a call was received, the reason for the call and the external entity the call was referred to.

A.4. Reporting Requirements

The contractor shall produce, at a minimum, the following reports beginning October 1, 2013:

ID	Name	Description	Frequency
1	Call Center Activity	Summary call center report that includes total calls received, average seconds to answer, average minutes per call and abandonment rate.	Daily
2	Call Reasons	All calls received categorized by primary call reason.	Weekly
3	Referral Summary	The number of calls referred to external entities, broken out by entity.	Weekly
3	Training	A list of all CSR training sessions held, including the date, purpose of training, number of CSR's in attendance and if the trainees were new hires or current employees.	Monthly

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A.5. Service Level Agreements

The contractor shall meet the following service level agreements (SLA). SLA #1 shall be effective during Month 1 (starting October 1) and SLAs #2 and #3 shall be enforced beginning in Month 4 (January 1, 2014-January 31, 2014). Failure to meet any service level will result in a penalty as described in the following table. These metrics shall be reported to the Exchange beginning Month 1 (October 1, 2013).

ID	Name	Description	Penalty (\$)
1	Operational on October 1, 2013	The Contractor shall be operational on October 1, 2013	\$2,000 for each business day starting on October 1 the contractor is not operational.
2	Abandonment Rate	Average Daily Abandonment Rate shall not exceed 3% during a one-month period. A call is considered abandoned when the caller has been waiting in queue for more than 30 seconds and hangs up before being handled by a CSR	\$5,000 for each month that exceeds 3%.
3	Average Seconds to Answer	Average Seconds to Answer shall not exceed 60 seconds during a business day.	\$1,000 for each business day the average exceeds 60 seconds.

A.6 Additional Requirements

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.

The Contractor shall also develop the following deliverables within 30 days of contract award:

- A Disaster Recovery Plan
- A Continuation of Operations Plan
- A Project Management Plan

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VI. Proposal Submission Process and Deadline

The proposal must follow the format provided in section VII, with tabbed and numbered sections.

One proposal with original signatures and ten copies must reach the Procurement Manager's office **no later than 12:00 p.m. MST on August 26, 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;

VII. Required Proposal Format

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

The following information is requested to be in your proposal. It is our intent to select finalists for a presentation to the Interim CEO and it is not our intent that the finalist's presentation mirrors the proposal exactly. The Contractor is to organize its proposal in a way that provides the Exchange with efficient and effective options to implement Call Center services consistent with the New Mexico First Model (Appendix B).

In your proposal, please include the following information:

1. Company Overview and Qualifications

- Company name, address, website
- Company history and experience (years in business)
- Key Contact name and title including business phone, mobile phone and email address
- Company size (by number of employees)
 - Number of Employees Assigned to Exchange Account
- Total company annualized revenue
- Biographies of key company personnel Exchange would be working with

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2. Specific Experience Related to RFP Objectives

- Up to three (3) references of Call Center work of similar size and scope. Please provide telephone numbers, names, and emails of contact persons
- Three (3) professional references for the proposed Project Manager on the Exchange account. The references should be previous clients for whom the individual served for engagements comparable to those outlined in this RFP.
- Explain what, if any, New Mexico resources will be utilized in the proposed Call Center.

3. Project Overview and Objectives

- Description of the Contractor's proposed model for providing New Mexico with a viable solution for both the Basic Call Routing Model and the New Mexico First Model. The contractor may propose more than one alternative to each of the model types.
- Provide specific objectives and the periods of time to achieve those objectives.
- Description of how the Contractor will implement the project.

4. Work Plan and Timeline

- The Call Center is to be operational by October 1,2013. The Contractor's work plan should detail the development and implementation, and operations and maintenance phases of the project.
- The work plan should include specific tasks and milestones.
- The work plan should include timelines for start and completion of the tasks.

5. Price Proposal

- The budget proposal should include pricing for each of the two proposed models.

For the development and implementation phase of the Contract, Contractors should tie pricing to specific milestones that will be listed in the work plan and timeline. Call volume is an estimate at this point. For the purposes of putting together a cost proposal, please utilize the following estimate:

Estimated daily average of between 150 and 500 calls that must be routed to the appropriate entity. Call volume is uncertain and is expected to be much higher during the early stages of this contract.

Provide one copy of the price proposal in a separately sealed envelope clearly marked on the outside "Call Center Price Proposal" along with the Contractor's name. The Exchange requires that the budget grid, included in this section, be

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completed. The Contractor must provide Per Hour and Per Cost, each with a maximum contract amount. The Contractor may provide a Per Minute Cost if you choose to bid by call handle time only. The Exchange requests Pricing for three scenarios:

- 1) 7 a.m. – 7 p.m., 5 days a week
- 2) 7 a.m. – 7 p.m., 7 days a week
- 3) 12:00 a.m. – 11:59 p.m., 7 days a week

The Contractor must include back-up information to support its pricing proposal.



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New Mexico First Model

	Operations 5 days/week			Operations 7 days/week			Operations 24 hours a day/ 7 days a week		
Design and Implementation	Per Minute Cost*	Per Hour Cost**	Per Call	Per Minute Cost	Per Hour Cost**	Per Call	Per Minute Cost	Per Hour Cost**	Per Call
Proposed Rate									
Maximum Contract Amount									
	Start Date	End Date							
Phase Time Period									

	Per	Per Hour	Per Call	Per	Per Hour	Per Call	Per	Per Hour	Per Call
On-Going Operations									
Proposed Rate									
Maximum Contract Amount									
	Start Date	End Date							
Phase Time Period									

* Use only if pricing per-handle time only; inclusive of all time (staff, supervision, training, QA, etc.)
 ** Hourly rate to include all Time and Expenses, including all time (including supervision, training, QA, etc.)

6. Disclosure Form

- Include a signed copy of **Attachment A - Certification and Conflict of Interest Disclosure Form**

VIII. Additional working assumptions to assist with the model and pricing proposals:

- Weekly status reports to Exchange;
- Kickoff meeting with designated Exchange employee and stakeholder workgroups;
- Initial interviews with Exchange Marketing Committee and Board members, Executive Director, HSD, OSI Superintendent, and Cabinet Secretary for New Mexico Indian Affairs;
- Work collaboratively with NMHIX on Public Relations, Outreach and Educational Content
- Attend other meetings, make presentations and participate in teleconferences as requested by the Exchange.
- The Toll-Free telephone number is and will remain the property of the NM HIX.

IX. Contract Close-Out Plan

The contractor shall work with the Dell Team to establish and document a plan to ensure the orderly turnover of all data and Agreement responsibilities five (5) business days prior to the end of the Contract period. The Contractor shall:

- Create a comprehensive list of data and transactions for turnover prior to Contractor go-live date; and
- Work with the Exchange to establish turnover timelines.

The Contractor shall turnover logs and dispositions of all calls, as well as 100% of all calls recorded.

X. Agency Selection Criteria and Weight

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

Organizational Capabilities/Background (20%): The Exchange will weigh heavily the Contractor's experience and ability to design and implement the requested call center within the tight timeframe requested, as well as the Contractor's capabilities of staffing

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such a call center that provides coverage during the uncertain ebbs and flows of call center activities. In doing so, the Exchange will review:

- The Contractor's history, growth, and size.
- The Contractor's form of business, physical locations, number of employees, client base, etc.
- The Contractor's ability to deliver the services sought after under this RFP (e.g., prior experience, prior projects, training, certifications, resources, program and quality management systems, etc.).
- The Contractor's key personnel and their experience performing similar projects.
- Strong preference will be given to Contractor's that propose New Mexico-based call center operations.

Specific Experience Related to the Goals of the RFP (20%): The Exchange will heavily consider past experience designing and implementing a call center of similar size and scope. The Exchange will review the following information about three (3) professional references from similar projects, including:

- Brief description of the project, including comparisons to the Exchanges proposed call center.
- The number of staff over a period of time, including the staff-to-supervisor ratio and staff turnover rates.
- Any significant performance metrics.

Work Plan and Timeline (30%): Time is of the essence and so the Exchange will weigh the comprehensiveness and reasonableness of the timeline. Contractors are responsible for providing a detailed work plan, replete with the tasks and activities, durations, dependencies, and resources based on the proposed approach and methodology, for each of the proposed models.

Budget Proposal (30%): Contractors are required to submit detailed price proposals for the design and implementation, and operations and maintenance phases of the project, for each of the proposed models. Pricing can be for the entire project or be specific to the different phases. The Exchange will be reviewing the pricing proposals with an eye toward achieving the best service for the best price.

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XI. Timeline

The Exchange staff will conduct a telephonic bidder’s conference, at which time the Exchange will talk about its immediate and longer term vision for the call center. Potential bidder’s will be allowed to ask questions during this time. One to three finalists may be selected to present and be interviewed by the Exchange. The selection of the Call Center Contractor will be made on or about September 6, with full implementation by October 1.

Initiative	Date
Release of RFP	8/16/2013
Bidder’s Teleconference	8/20/2013 11 a.m. MST Telephone: 888-866-0650 Code: 0112165#
Submission of RFP	8/26/2013, 12 p.m. NOON
Clarification Calls (the Exchange may call bidders to clarify proposal components)	8/26/2013 – 8/27/2013
Evaluation of RFP	8/26/2013 – 8/27/2013
NM HIX Board Approval (TBD)	8/28/13
Contract Negotiations	8/28/2013 through 9/6/2013
Award of Contract	9/6/2013
Services Commence	9/6/2013

Dates are subject to change at the discretion of the Evaluation Committee.

XII. Standard Terms and Conditions

The NM HIX’s Standard Contract can be found at <http://www.nmhix.com/wp-content/uploads/2013/01/NMHIX-standard-contract.pdf>. **The Contractor must agree to sign a contract within 5 days of the Exchange’s award of the contract.**

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Appendix A
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: _____

Appendix B
“New Mexico First Model”

New Mexico First

