HEALTH CARE AUTHORITY

<u>REQUEST FOR PROPOSALS (RFP)</u>

PCPR Project Management

RFP# 27-630-8000-0008

RFP Release Date: August 31, 2026

Proposal Due Date: October 5, 2026

ELECTRONIC-ONLY PROPOSAL SUBMISSION

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I. INTRODUCTION

A. PURPOSE OF THIS REQUEST FOR PROPOSALS

The purpose of the Request for Proposal (RFP) is to solicit sealed proposals to establish a contract through competitive negotiations for the procurement of comprehensive project management and program support services for the New Mexico Medicaid Primary Care Payment Reform (PCPR) Value-Based Payment Program, including project management, program administration, stakeholder engagement, technical assistance, performance monitoring, reporting, and implementation support.

B. BACKGROUND INFORMATION

The New Mexico Health Care Authority (HCA) administers the Primary Care Payment Reform (PCPR) Value-Based Payment Program, a Medicaid State Directed Payment (SDP) program designed to strengthen primary care through value-based payment models that improve quality, access, and health outcomes for Medicaid members.

Since the program's implementation, HCA has worked with providers, managed care organizations (MCOs), and other stakeholders to establish the program's quality framework and operational infrastructure. As the PCPR program continues to mature, participating organizations will transition to more advanced value-based payment arrangements, requiring increased technical assistance, stakeholder engagement, project coordination, and program oversight.

To support this transition, HCA requires the assistance of a contractor with extensive experience designing, implementing, and managing Medicaid State Directed Payment programs and value-based payment initiatives. The selected contractor will provide project management services, facilitate collaboration among key stakeholders, deliver technical assistance to participating providers and MCOs, and support the ongoing implementation and continuous improvement of the PCPR program.

C. SCOPE OF PROCUREMENT

The New Mexico Health Care Authority (HCA) is seeking proposals from qualified Offerors to provide comprehensive project management and program support services for the New Mexico Medicaid Primary Care Payment Reform (PCPR) Value-Based Payment (VBP) Program. The Contractor will support the continued implementation and evolution of the PCPR program through project management, stakeholder engagement, provider recruitment and technical assistance, program operations, program evaluation, and recommendations for continuous program improvement based on performance measures. The Contractor will also support coordination among HCA, managed care organizations (MCOs), participating providers, Tribal partners, and other key stakeholders to facilitate successful implementation of the program and the continued transition to advanced value-based payment models.

The resulting contract is anticipated to be for an initial term of one (1) year, with the option to renew for three (3) additional one-year terms, subject to the availability of funding, and satisfactory contractor performance.

This RFP will result in a single award.

This procurement will result in a contractual agreement between two parties; the procurement may ONLY be used by those two parties exclusively.

D. PROCUREMENT MANAGER

The Health Care Authority has assigned a Procurement Manager who is responsible for the conduct of this procurement whose name, address, telephone number and e-mail address are listed below:

Name:	Trisstin Maroney, Procurement Manager
Telephone:	(505) 618-0318
Email:	Trisstin.Maroney@hca.nm.gov

1. **Any inquiries or requests** regarding this procurement should be submitted, in writing, to the Procurement Manager. Offerors may contact **ONLY** the Procurement Manager regarding this procurement. Other state employees or Evaluation Committee members do not have the authority to respond on behalf of the HCA/HCA.

2. **Protests of the solicitation or award must be submitted in writing to the Protest Manager identified in Section II.B.13.** As a Protest Manager has been named in this Request for Proposals, pursuant to §13-1-172 NMSA 1978 and 1.4.1.82 NMAC, **ONLY protests delivered directly to the Protest Manager in writing and in a timely fashion will be considered to have been submitted properly and in accordance with statute, rule and this Request for Proposals.** Protests submitted or delivered to the Procurement Manager will **NOT** be considered properly submitted.

E. PROPOSAL SUBMISSION

Submissions of all proposals must be accomplished via the Health Care Authority's electronic procurement portal, Bonfire. Refer to Section III.B.1 for instructions.

F. DEFINITION OF TERMINOLOGY

This section contains definitions of terms used throughout this procurement document, including appropriate abbreviations:

1. "**Agency**" means the State Purchasing Division of the General Services Department or that State Agency sponsoring this Procurement.

2. “**Award**” means the final execution of the contract document.

3. “**Business Hours**” means weekdays (Monday – Friday) 8:00 AM thru 5:00 PM MST/MDT, whichever is in effect on the date given.

4. “Center for Medicare and Medicaid Services/CMS” is the federal agency that administers major U.S. healthcare programs including the oversight of State Directed Payments.

5. “**Close of Business**” means weekdays (Monday – Friday) 5:00 PM MST/MDT, whichever is in effect on the date given.

6. “**Confidential**” means confidential financial information concerning Offeror’s organization and data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act §§57-3-A-1 through 57-3A-7 NMSA 1978,. See also NMAC 1.4.1.45. The following items may **not** be labelled as confidential: Offeror’s submitted Cost response, Staff/Personnel Resumes/Bios (excluding personal information such as personal telephone numbers and/or home addresses), and other submitted data that is **not** confidential financial information or that qualifies under the Uniform Trade Secrets Act.

7. “**Contract**” means any agreement for the procurement of items of tangible personal property, services or construction.

8. “**Contractor**” means any business having a contract with a state agency or local public body.

9. “**Determination**” means the written documentation of a decision of a procurement officer including findings of fact required to support a decision. A determination becomes part of the procurement file to which it pertains.

10. “**Desirable**” – the terms ”may,” “can,” “should,” “preferably,” or “prefers” identify a desirable or discretionary item or factor.

11. “**Electronic Submission**” means a successful submittal of Offeror’s proposal in the EUNA/Bonfire system.

12. “**Electronic Version/Copy**” means a digital format consisting of text, images or both, readable on computers or other electronic devices, which includes all content that the Original document contains. The electronic version/copy CANNOT be emailed.

13. “**Evaluation Committee**” means a body appointed to perform the evaluation of Offerors’ proposals.

14. “**Evaluation Committee Report**” means a report prepared by the Procurement Manager and the Evaluation Committee to support the Committee’s recommendation for contract award. It will contain scores and written evaluations of all responsive Offeror proposals.

15. “**Final Award**” means, in the context of this Request for Proposals and all its attendant documents, that point at which the final required signature on the contract(s) resulting from the procurement has been affixed to the contract(s) thus making it fully executed.

16. “**Finalist**” means an Offeror who meets all the mandatory specifications of this Request for Proposals and whose score on evaluation factors is sufficiently high to merit further consideration by the Evaluation Committee, as explained in Section II.B.8.

17. “**Hourly Rate**” means the proposed fully loaded maximum hourly rates that include travel, per diem, fringe benefits and any overhead costs for contractor personnel, as well as subcontractor personnel if appropriate.

18. “**IT**” means Information Technology.

19. “**Mandatory**” – the terms ”must,” ”shall” ”will,” ”is required,” or ”are required,” identify a mandatory item or factor. Failure to meet a mandatory item or factor may result in the rejection of the Offeror’s proposal.

20. “**Minor Irregularities**” means anything in the proposal that does not affect the price, quality and/or quantity, or any other mandatory requirement.

21. “**Multiple Source Award**” means an award of a contract for one or more items of tangible personal property, services or construction to more than one Offeror.

22. “**Offeror**” is any person, corporation, or partnership who chooses to submit a proposal.

23. “**Price Agreement**” means a definite quantity contract or indefinite quantity contract which requires the contractor to furnish items of tangible personal property, services or construction to a state agency or a local public body which issues a purchase order, if the purchase order is within the quantity limitations of the contract, if any.

24. “**Procurement Manager**” means any person or designee authorized by a state agency or local public body with the responsibility, authority, and resources to conduct the RFP procurement, make written determinations regarding the RFP procurement, and/or enter into or administer contracts as a result of the RFP procurement.

25. “**Procuring Agency**" means all State of New Mexico agencies, commissions, institutions, political subdivisions and local public bodies allowed by law to procure items of tangible personal property, services or construction from the agreement(s) awarded as a result of this RFP.

26. “**Project**” means a temporary process undertaken to solve a well-defined goal or objective with clearly defined start and end times, a set of clearly defined tasks, and a budget. The project terminates once the project scope is achieved and project acceptance is given by the project executive sponsor.

27. “**Redacted**” means a version/copy of the Offeror’s proposal with the information considered proprietary or confidential (as defined by §§57-3A-1 to 57-3A-7 NMSA 1978 and NMAC 1.4.1.45 and summarized herein and outlined in Section II.C.8 of this RFP) blacked-out <u>BUT NOT</u> omitted or removed.

28. “**Request for Proposals (RFP)**” means all documents, including those attached or incorporated by reference, used for soliciting proposals.

29. “**Responsible Offeror**" means an Offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that his financial resources, production or service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services, or items of tangible personal property described in the proposal.

30. “**Responsive Offer**” or means an offer which conforms in all material respects to the requirements set forth in the request for proposals. Material respects of a request for proposals include, but are not limited to price, quality, quantity or delivery requirements.

31. “**Sealed**” means, in terms of electronic submission, an Offeror’s proposal and all accompanying documents has been completely and successfully uploaded into HCA’S/HCA’s electronic procurement portal bonfire system prior to the submission deadline stated in the RFP.

32. **“Single Source Award**” means an award of contract for items of tangible personal property, services or construction to only one Offeror.

33. “**SPD**” means State Purchasing Division of the New Mexico State General Services Department.

34. “**Staff**” means any individual who is a full-time, part-time, or an independently contracted employee with the Offerors’ company.

35. “**State (the State)**” means the State of New Mexico.

36. “**State Agency**” means any department, commission, council, board, committee, institution, legislative body, agency, government corporation, educational institution or official of the executive, legislative or judicial branch of the government of this state. “State agency” includes the Purchasing Division of the General Services Department and the State Purchasing Agent but does not include local public bodies.

37. “State-Directed Payment/SDP” is a payment beyond standard capitation or fee-for-service payments that a state requires managed care organizations to make to specific healthcare providers to support Medicaid program goals, supplement base payments and improve access and quality of care.

38. “**State Purchasing Agent**” means the Director of the Purchasing Division of the General Services Department.

39. “**Statement of Concurrence**” means an affirmative statement from the Offeror indicating its response to a required Section IV specification agreeing to comply and concur with the stated requirement(s). This statement shall be included in Offerors proposal, pursuant to Section III.C.1. (E.g. “We concur,” “Understands and Complies,” “Comply,” “Will Comply if Applicable,” etc.)

40. “**Unredacted**” means a version/copy of the proposal containing all complete information; including any that the Offeror would otherwise consider confidential, such copy for use only for the purposes of evaluation.

41. “Value-based Payment/VBP” is a healthcare reimbursement model where providers are paid based on patient health outcomes that reward quality and efficiency rather than the volume of services delivered. It financially incentivizes providers to improve outcomes, reduce complications, and manage costs effectively by meeting quality targets.

42. “**Written**” means typed in standard 8 ½ x 11 inch document format, by common electronic means (such as Microsoft Word, Adobe PDF, etc.). A larger size document is permissible for charts, spreadsheets, etc.

G. PROCUREMENT LIBRARY

A procurement library has been established. Offerors are encouraged to review the material contained in the Procurement Library by selecting the link provided in this document through your own internet connection. The library contains information listed below:

RFP, Questions & Answers, RFP Amendments: Open RFPs – New Mexico Health Care Authority

Other relevant links:

HCA PCPR Website: https://www.hca.nm.gov/primary-care-council/primary-care-payment-reform/

CMS State Directed Payment Guidance: https://www.medicaid.gov/medicaid/managed-care/guidance/state-directed-payments

HCA PCPR Letter of Direction 60-1: https://www.hca.nm.gov/wp-content/uploads/FINAL-LOD-60-2-CY26-PCPR-VBP-RR-LOD-60-1-1.pdf

HCA PCPR Letter of Direction 60-2: FINAL-LOD-60-3-CY26-PCPR-RR-LOD-60-2.pdf

Net Health PCPR Overview: NM PCPR

II. CONDITIONS GOVERNING THE PROCUREMENT

This section of the RFP contains the schedule of events, the descriptions of each event, and the conditions governing this procurement.

A. SEQUENCE OF EVENTS

The Procurement Manager will make every effort to adhere to the following schedule:

Action	Responsible Party	Due Dates
1. Issue RFP	HCA/HCA	August 31, 2026
2. Acknowledgement of Receipt Form	Potential Offerors	September10, 2026
3. Pre-Proposal Conference	Agency	September10, 2026
4. Deadline to submit Written Questions	Potential Offerors	September 14, 2026
5. Response to Written Questions	Procurement Manager	September 18, 2026
6. Submission of Proposal	***Potential Offerors***	***October 5, 2026***
7.* Proposal Evaluation	Evaluation Committee	October 6-October 23, 2026
8.* Selection of Finalists	Evaluation Committee	October 23, 2026
9 * Oral Presentation(s)	Finalist Offerors	October 26, 2026
10.* Best and Final Offers	Finalist Offerors	October 26, 2026
11.* Finalize Contractual Agreements	Agency/Finalist Offerors	October 27-November 2, 2026
12.* Contract Awards	Agency/ Finalist Offerors	December 1, 2026
13.* Protest Deadline	HCA/HCA	December 16, 2026

*Dates indicated in Events 7 through 13 are estimates only, and may be subject to change without necessitating an amendment to the RFP.

B. EXPLANATION OF EVENTS

The following paragraphs describe the activities listed in the Sequence of Events shown in Section II.A., above.

1. Issue RFP

This RFP is being issued on behalf of the State of New Mexico Health Care Authority on the date indicated in Section II.A, Sequence of Events.

2. Acknowledgement of Receipt Form

Potential Offerors may e-mail the Acknowledgement of Receipt Form (APPENDIX A), to the HCA Procurement Manager, Trisstin Maroney, Trisstin.Maroney@hca.nm.gov, to have their organization placed on the procurement Distribution List. The form must be returned to the procurement manager by 3:00 pm MST/ MDT on the date indicated in Section II.A, Sequence of Events.

The procurement distribution list will be used for the distribution of written responses to questions, and/or any amendments to the RFP. Failure to return the Acknowledgement of Receipt Form does not prohibit potential Offerors from submitting a response to this RFP. However, by not returning the Acknowledgement of Receipt Form, the potential Offeror's representative shall not be included on the distribution list, and will be solely responsible for obtaining from the Procurement Library (Section I.G.) responses to written questions and any amendments to the RFP.

3. Pre-Proposal Conference

A pre-proposal conference will be held as indicated in Section II.A, Sequence of Events, beginning at 2:00 pm MST/MDT via **Microsoft Teams.**
Join: https://teams.microsoft.com/meet/214466378352063?p=Ci2m9F15jpuaNmLwQZ
Meeting ID: 214 466 378 352 063
Passcode: zQ9Rs3LB

Potential Offeror(s) are encouraged to submit written questions in advance of the conference to the Procurement Manager (see Section I.D). The identity of the organization submitting the question(s) will not be revealed. Additional written questions may be submitted at the conference. All questions answered during the Pre-Proposal Conference will be considered **unofficial** until they are posted in writing. All written questions will be addressed in writing on the date listed in Section II.A, Sequence of Events. A public log will be kept of the names of potential Offeror(s) that attended the pre-proposal conference.

Attendance at the pre-proposal conference is highly recommended, but not a prerequisite for submission of a proposal.

4. Deadline to Submit Written Questions

Potential Offerors may submit written questions to the Procurement Manager as to the intent or clarity of this RFP until 5:00 pm MST/MDT as indicated in Section II.A, Sequence of Events. All written questions must be addressed to the Procurement Manager as declared in Section I.D. Questions shall be clearly labeled and shall cite the Section(s) in the RFP or other document which form the basis of the question.

5. Response to Written Questions

Written responses to the written questions will be provided via e-mail, on or before the date indicated in Section II.A, Sequence of Events, to all potential Offerors who timely submitted an Acknowledgement of Receipt Form (Section II.B.2 and APPENDIX A).

The Questions and Answers will be posted to:

New Mexico Health Care Authority (Euna portal)
Open RFPs | New Mexico Health Care Authority

6. **Submission of Proposal**

At this time, only **electronic** proposal submission is allowed. **Do not** submit hard copies until further notice.

ALL PROPOSALS MUST BE RECEIVED BY THE PROCUREMENT MANAGER OR DESIGNEE NO LATER THAN 3:00 PM MST/MDT ON THE DATE INDICATED IN SECTION II.A, SEQUENCE OF EVENTS. **NO LATE PROPOSAL CAN BE ACCEPTED.** The date and time of receipt will be recorded on each proposal. Proposals will be time-stamped in the system when the Offeror clicks "OK" after "Review and Submit." Such electronic submissions will be considered sealed in accordance with statute.

It is the Offeror's responsibility to ensure all documents are completely uploaded and submitted electronically via the HCA's Bonfire system by the deadline set forth in this RFP. The HCA's Bonfire system will automatically cease uploading data at the date and time of the deadline. Please ensure that you, as the Offeror, ***allow adequate time for large uploads and to fully complete your submittal by the deadline****. A submission that is not both: (1) fully complete; and (2) received, via the Bonfire system by the deadline, will be deemed late. Further, a submission that is not fully complete and received via the Bonfire system by the deadline because the response was captured, blocked, filtered, quarantined or otherwise prevented from reaching the proper destination server by any anti-virus or other security software will be deemed late. In accordance with statute and rule,* ***NO LATE PROPOSAL CAN BE ACCEPTED.***

Proposals must be submitted electronically through HCA's/HCAS's Bonfire electronic procurement system. Refer to Section III.B.1 for instructions. Proposals submitted by facsimile, or other electronic means other than through the HCA's/HCA's electronic e-procurement system, will not be accepted.

A log will be kept of the names of all Offeror organizations that submitted proposals. Pursuant to §13-1-116 NMSA 1978, the contents of proposals shall not be disclosed to competing potential Offerors during the negotiation process. The negotiation process is deemed to be in effect until the contract is awarded pursuant to this Request for Proposals. Awarded in this context means the final required state agency signature on the contract(s) resulting from the procurement has been obtained.

7. **Proposal Evaluation**

An Evaluation Committee will perform the evaluation of proposals. This process will take place as indicated in Section II.A, Sequence of Events, depending upon the number of proposals received. During this time, the Procurement Manager may initiate discussions with Offerors who submit responsive or potentially responsive proposals for the purpose of clarifying aspects of the proposals. However, proposals may be accepted and evaluated without such discussion. Discussions SHALL NOT be initiated by the Offerors.

8. Selection of Finalists

The Evaluation Committee will select and the Procurement Manager will notify the finalist Offerors as per schedule Section II.A, Sequence of Events or as soon as possible thereafter. A schedule for Oral Presentation, if any, will be determined at this time.

9. Oral Presentations

Finalist Offerors, as selected per Section II.B.8 above, may be required to conduct an oral presentation at a venue to be determined as per schedule Section II.A., Sequence of Events, or as soon as possible thereafter. If Oral Presentations are held, Finalist Offerors may be required to make their presentations through electronic means (Microsoft Teams, Zoom, etc). The Agency will provide Finalist Offerors with an agenda and applicable details; including an invitation to the event. Whether or not Oral Presentations will be held is at the sole discretion of the Evaluation Committee.

10. Best and Final Offers

Finalist Offerors may be asked to submit revisions to their proposals for the purpose of obtaining best and final offers by as per schedule Section II. A., Sequence of Events or as soon as possible. Best and final offers may also be clarified and amended at finalist Offeror's oral presentation.

11. Finalize Contractual Agreements

After approval of the Evaluation Committee Report, any contractual agreement(s) resulting from this RFP will be finalized with the most advantageous Offeror(s), taking into consideration the evaluation factors set forth in this RFP, as per Section II.A., Sequence of Events, or as soon as possible thereafter. The most advantageous proposal may or may not have received the most points. In the event mutually agreeable terms cannot be reached with the apparent most advantageous Offeror in the timeframe specified, the State reserves the right to finalize a contractual agreement with the next most advantageous Offeror(s) without undertaking a new procurement process.

12. Contract Awards

Upon receipt of the signed contractual agreement, the Agency Procurement office will award as per Section II.A., Sequence of Events, or as soon as possible thereafter. The award is subject to appropriate Department and State approval.

13. Protest Deadline

Any protest by an Offeror must be submitted timely and in conformance with §13-1-172 NMSA 1978 and applicable procurement regulations. As a Protest Manager has been named in this Request for Proposals, pursuant to §13-1-172 NMSA 1978 and 1.4.1.82 NMAC, ONLY protests delivered directly to the Protest Manager in writing and in a timely fashion will be considered to have been submitted properly and in accordance with statute, rule and this Request for Proposals. The 15-calendar day protest period shall begin on the day following the notice of award of contract(s) and will end at 5:00 pm MST/MDT on the 15th day. Protests must be written and must include the name and address of the protestor and the request for proposal number. It must also contain a statement of the grounds for protest including appropriate supporting exhibits and it must specify the ruling requested from the party listed below. The protest must be directed to:

Office of General Counsel
1474 Rodeo Rd.
Santa Fe, New Mexico 87505

PROTESTS RECEIVED AFTER THE DEADLINE WILL NOT BE ACCEPTED.

C. GENERAL REQUIREMENTS

1. Acceptance of Conditions Governing the Procurement

Offerors must indicate their acceptance to be bound by the Conditions Governing the Procurement, Section II.C, and Evaluation, Section V, by completing and signing the Letter of Transmittal form, pursuant to the requirements in Section II.C.30, located in APPENDIX E.

2. Incurring Cost

Any cost incurred by the potential Offeror in preparation, transmittal, and/or presentation of any proposal or material submitted in response to this RFP shall be borne solely by the Offeror. Any cost incurred by the Offeror for set up and demonstration of the proposed equipment and/or system shall be borne solely by the Offeror.

3. Prime Contractor Responsibility

Any contractual agreement that may result from this RFP shall specify that the prime contractor is solely responsible for fulfillment of all requirements of the contractual agreement with a State Agency which may derive from this RFP. The State Agency entering into a contractual agreement with a vendor will make payments to only the prime contractor.

4. Subcontractors/Consent

The use of subcontractors is allowed. The prime contractor shall be wholly responsible for the entire performance of the contractual agreement whether or not subcontractors are used. Additionally, the prime contractor must receive approval, in writing, from the agency awarding any resultant contract, before any subcontractor is used during the term of this agreement.

5. Amended Proposals

An Offeror may submit an amended proposal before the deadline for receipt of proposals. Such amended proposals must be complete replacements for a previously submitted proposal and must be clearly identified as such in the transmittal letter. **Agency personnel will not merge, collate, or assemble proposal materials.**

6. Offeror's Rights to Withdraw Proposal

Offerors will be allowed to withdraw their proposals at any time prior to the deadline for receipt of proposals. The Offeror must submit a written withdrawal request addressed to the Procurement Manager and signed by the Offeror's duly authorized representative.

The approval or denial of withdrawal requests received after the deadline for receipt of the proposals is governed by the applicable procurement regulations, 1.4.1.5 & 1.4.1.36 NMAC.

7. Proposal Offer Firm

Responses to this RFP, including proposal prices for services, will be considered firm for one-hundred twenty (120) days after the due date for receipt of proposals or ninety (90) days after the due date for the receipt of a best and final offer, if the Offeror is invited or required to submit one.

8. Disclosure of Proposal Contents

The contents of all submitted proposals will be kept confidential until the final award has been completed by the Agency. At that time, all proposals and documents pertaining to the proposals will be available for public inspection, *except* for proprietary or confidential material as follows:

a. ***Proprietary and Confidential information is restricted to***:
   1. confidential financial information concerning the Offeror's organization; and
   2. information that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act, §§57-3A-1 through 57-3A-7 NMSA 1978.

b. An additional but separate redacted version of Offeror's proposal, as outlined and identified in Section III.B.2.a, shall be submitted containing the blacked-out proprietary or confidential information, in order to facilitate eventual public inspection of the non-confidential version of Offeror's proposal.

IMPORTANT: The price of products offered or the cost of services proposed **SHALL NOT** be designated as proprietary or confidential information.

If a request is received for disclosure of proprietary or confidential materials, the Agency shall examine the 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 proprietary or confidential information.

9. No Obligation

This RFP in no manner obligates the State of New Mexico or any of its Agencies to the use of any Offeror's services until a valid written contract is awarded and approved by appropriate authorities.

10. Termination

This RFP may be canceled at any time and any and all proposals may be rejected in whole or in part when the Agency determines such action to be in the best interest of the State of New Mexico.

11. Sufficient Appropriation

Any contract awarded as a result of this RFP process may be terminated if sufficient appropriations or authorizations do not exist. Such terminations will be affected by sending written notice to the contractor. The Agency's decision as to whether sufficient appropriations and authorizations are available will be accepted by the contractor as final.

12. Legal Review

The Agency requires that all Offerors agree to be bound by the General Requirements contained in this RFP. Any Offeror's concerns must be promptly submitted in writing to the attention of the Procurement Manager.

13. Governing Law

This RFP and any agreement with an Offeror which may result from this procurement shall be governed by the laws of the State of New Mexico.

14. Basis for Proposal

Only information supplied in writing by the Procurement Manager or contained in this RFP shall be used as the basis for the preparation of Offeror proposals.

15. Contract Terms and Conditions

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

The Agency discourages exceptions from the contract terms and conditions as set forth in the RFP Draft Contract. Such exceptions may cause a proposal to be rejected as nonresponsive when, in the sole judgment of the Agency (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 is proposed which would require a substantial proposal rewrite to correct.

Should an Offeror object to any of the terms and conditions as set forth in the RFP Draft Contract (APPENDIX C) strongly enough to propose alternate terms and conditions in spite of the above, the Offeror must propose **specific** alternative language. The Agency may or may not accept the alternative language. General references to the Offeror's terms and conditions or attempts at complete substitutions of the Draft Contract are not acceptable to the Agency 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.

If an Offeror fails to propose any alternate terms and conditions during the procurement process (the RFP process prior to selection as successful Offeror), no proposed alternate terms and conditions will be considered later during the negotiation process. Failure to propose alternate terms and conditions during the procurement process (the RFP process prior to selection as successful Offeror) is an **explicit agreement** by the Offeror that the contractual terms and conditions contained herein are **accepted** by the Offeror.

16. Offeror's Terms and Conditions

Offerors must submit with the proposal a complete set of any additional terms and conditions they expect to have included in a contract negotiated with the Agency. See Section II.C.15 for requirements.

17. Contract Deviations

Any additional terms and conditions, which may be the subject of negotiation (such terms and conditions having been proposed during the procurement process, that is, the RFP process prior to selection as successful Offeror), will be discussed only between the Agency and the Offeror selected and shall not be deemed an opportunity to amend the Offeror's proposal.

18. Offeror Qualifications

The Evaluation Committee may make such investigations as necessary to determine the ability of the potential Offeror to adhere to the requirements specified within this RFP. The Evaluation Committee will reject the proposal of any potential Offeror who is not a Responsible Offeror or fails to submit a Responsive Offer as defined in §13-1-83 and §13-1-85 NMSA 1978.

19. Right to Waive Minor Irregularities

The Evaluation Committee reserves the right to waive minor irregularities, as defined in Section I.F.19. The Evaluation Committee also reserves the right to waive mandatory requirements, provided that **all** of the otherwise responsive proposals failed to meet the same mandatory requirements and the failure to do so does not otherwise materially affect the procurement. This right is at the sole discretion of the Evaluation Committee.

20. Change in Contractor Representatives

The Agency reserves the right to require a change in contractor representatives if the assigned representative(s) is (are) not, in the opinion of the Agency, adequately meeting the needs of the Agency.

21. Notice of Penalties

The Procurement Code, §§13-1-28 through 13-1-199 NMSA 1978, imposes civil, and misdemeanor and felony criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for bribes, gratuities and kickbacks.

22. Agency Rights

The Agency, in agreement with the Evaluation Committee, reserves the right to accept all or a portion of a potential Offeror's proposal.

23. Right to Publish

Throughout the duration of this procurement process and contract term, Offerors and contractors must secure from the agency written approval prior to the release of any information that pertains to the potential work or activities covered by this procurement and/or agency contracts deriving from this procurement. Failure to adhere to this requirement may result in disqualification of the Offeror's proposal or removal from the contract.

24. Ownership of Proposals

All documents submitted in response to the RFP shall become property of the State of New Mexico. If the RFP is cancelled, all responses received shall be destroyed by the Agency or HCA/HCA.

25. Confidentiality

Any confidential information provided to, or developed by, the contractor in the performance of the contract resulting from this RFP shall be kept confidential and shall not be made available to any individual or organization by the contractor without the prior written approval of the Agency.

The Contractor(s) agrees to protect the confidentiality of all confidential information and not to publish or disclose such information to any third party without the procuring Agency's written permission.

26. Electronic mail address required

A large part of the communication regarding this procurement will be conducted by electronic mail (e-mail). Offeror must have a valid e-mail address to receive this correspondence. (See also Section II.B.5, Response to Written Questions).

27. Use of Electronic Versions of this RFP

This RFP is being made available by electronic means. In the event of conflict between a version of the RFP in the Offeror's possession and the version maintained by the agency, the Offeror acknowledges that the version maintained by the agency shall govern. Please refer to:

28. New Mexico Employees Health Coverage

A. If the Offeror has, or grows to, six (6) or more employees who work, or who are expected to work, an average of at least 20 hours per week over a six (6) month period during the term of the contract, Offeror must agree to have in place, and agree to maintain for the term of the contract, health insurance for those employees if the expected annual value in the aggregate of any and all contracts between Contractor and the State exceed $250,000 dollars.

B. Offeror must agree to maintain a record of the number of employees who have (a) accepted health insurance; (b) decline health insurance due to other health insurance coverage already in place; or (c) decline health insurance for other reasons. These records are subject to review and audit by a representative of the state.

C. Offeror must agree to advise all employees of the availability of State publicly financed health care coverage programs by providing each employee with, as a minimum, the following web site link to additional information: https://bewellnm.com.

D. For Indefinite Quantity, Indefinite Delivery contracts (price agreements without specific limitations on quantity and providing for an indeterminate number of orders to be placed against it); these requirements shall apply the first day of the second month after the Offeror reports combined sales (from state and, if applicable, from local public bodies if from a state price agreement) of $250,000.

29. Campaign Contribution Disclosure Form

Offeror must complete, sign, and return the Campaign Contribution Disclosure Form (APPENDIX B) as a part of their proposal. This requirement applies regardless whether a covered contribution was made or not made for the positions of Governor and Lieutenant

Governor or other identified official. **<u>Failure to complete and return the signed, unaltered form will result in Offeror's disqualification.</u>**

30. Letter of Transmittal

Offeror's proposal must be accompanied by a Letter of Transmittal Form (APPENDIX E), which must be **<u>signed</u>** by the individual authorized to contractually obligate the company, identified in #2 below.

Provide the following information:

1. Identify the submitting business entity; Name, Mailing Address, Phone Number, Federal Tax ID Number (TIN), and New Mexico Business Tax ID Number (BTIN, formerly CRS);
2. Identify the Name, Title, Telephone, and E-mail address of the person authorized by the Offeror's organization to (A) contractually obligate the business entity providing the Offer, (B) negotiate a contract on behalf of the organization; and/or (C) provide clarifications or answer questions regarding the Offeror's proposal content *(A response to B and/or C is only necessary if the responses differs from the individual identified in A)*;
3. Identify any subcontractor/s that may be utilized in the performance of any resultant contract award;
4. Identify any other entity/-ies (such as State Agency, reseller, etc., that is not a sub-contractor identified in #3) that may be used in the performance of this awarded contract; and
5. The individual identified in #2 above, must sign and date the form, attesting to the veracity of the information provided, and acknowledging (a) the organization's acceptance of the Conditions Governing the Procurement stated in Section II.C.1, (b) the organizations acceptance of the Section V Evaluation Factors, and (c) receipt of any and all amendments to the RFP.

<u>Failure to submit a signed Letter of Transmittal Form (Appendix E) will result in Offeror's disqualification.</u>

31. Disclosure Regarding Responsibility

A. Any prospective Contractor and any of its Principals who enter into a contract greater than sixty thousand dollars ($60,000.00) with any state agency or local public body for professional services, tangible personal property, services or construction agrees to disclose whether the Contractor, or any principal of the Contractor's company:
   1. is presently debarred, suspended, proposed for debarment, or declared ineligible for award of contract by any federal entity, state agency or local public body;
   2. has within a three-year period preceding this offer, been convicted in a criminal matter or had a civil judgment rendered against them for:
      a. the 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;

b. violation of Federal or state antitrust statutes related to the submission of offers; or
c. the 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. is presently indicted for, or otherwise criminally or civilly charged by any (federal state or local) government entity with the commission of any of the offenses enumerated in paragraph A of this disclosure;
4. has, preceding this offer, been notified of any delinquent Federal or state taxes in an amount that exceeds $3,000.00 of which the liability remains unsatisfied. Taxes are considered delinquent if the following criteria apply.

a. 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.
b. 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.
c. 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.)

B. 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.

C. The Contractor shall provide immediate written notice to the State Purchasing Agent or other party to this Agreement if, at any time during the term of this Agreement, the Contractor learns that the Contractor's disclosure was at any time erroneous or became erroneous by reason of changed circumstances.

D. A disclosure that any of the items in this requirement exist will not necessarily result in termination of this Agreement. However, the disclosure will be considered in the determination of the Contractor's responsibility and ability to perform under this Agreement. Failure of the Contractor to furnish a disclosure or provide additional information as requested will render the Offeror nonresponsive.

E. 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 a Contractor is not required to exceed that which is the normally possessed by a prudent person in the ordinary course of business dealings.

F. 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 during the term of this Agreement. 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 State Purchasing Agent or other party to this Agreement. If it is later determined that the Contractor knowingly rendered an erroneous disclosure, in addition to other remedies available to the Government, the State Purchasing Agent or Central Purchasing Officer may terminate the involved contract for cause. Still further the State Purchasing Agent or Central Purchasing Officer may suspend or debar the Contractor from eligibility for future solicitations until such time as the matter is resolved to the satisfaction of the State Purchasing Agent or Central Purchasing Officer.

32. New Mexico/Native American Resident Preferences

The New Mexico/Native American Resident Preferences shall not apply because the expenditures for this RFP includes federal funds.

III. RESPONSE FORMAT AND ORGANIZATION

A. NUMBER OF RESPONSES

Offerors shall submit only one proposal in response to this RFP ELECTRONIC SUBMISSION

1. **ONLY ELECTRONIC SUBMISSION VIA (Health Care Authority Procurement Portal, Euna Interactive) can be accessed https//newmexicohsd.bonfirehub.com**
2. **All vendors must register with the Procurement Portal to log in and submit requested information.**

<u>Proposals in response to this RFP must be submitted through the Health Care Authority Services Purchasing's electronic procurement portal ONLY</u>; the Offeror needs to submit only one single electronic copy of each portion of its proposal (Technical and Cost) as outlined below. Separate the proposals as described below into separate electronic files for submission.
Proposals must be submitted in the manner outlined below. Technical and Cost portions of Offeror's proposal **<u>must</u>** be submitted in separate uploads as indicated below in this section, and **<u>must</u>** be prominently identified as "Technical Proposal," or "Cost Proposal," on the front page of each upload

1. **Technical Proposals –** One (1) ELECTRONIC upload must be organized in accordance with **Section III.C.1. Proposal Format**. All information for the Technical Proposal **<u>must be combined into a single file/document for uploading</u>**. *EXCEPTION: Single electronic files that exceed 50mb may be submitted as multiple uploads, which must be the least number of uploads necessary to fall under the 50mb limit.* The Technical Proposals ***<u>SHALL NOT</u>*** *contain any cost information.*

   a. **<u>Confidential Information</u>**: If Offeror's proposal contains confidential information, as defined in Section I.F.6 and detailed in Section II.C.8, Offeror **<u>must</u>** submit **<u>two (2) separate ELECTRONIC technical files:</u>**

      i. One (1) ELECTRONIC version of the requisite proposals identified in Section III.B.1.a above as **<u>unredacted</u>** (def. Section I.F.38) versions for evaluation purposes; and

      ii. One (1) **redacted** (def. Section I.F.27) ELECTRONIC for the public file, in order to facilitate eventual public inspection of the non-confidential version of Offeror's proposal. Redacted versions **<u>must</u>** be clearly marked as "REDACTED" or "CONFIDENTIAL" on the first page of the electronic file;

2. **Cost Proposals –** One (1) ELECTRONIC upload of the proposal containing **<u>ONLY</u>** the Cost Proposal. All information for the cost proposal **<u>must be combined into a single file/document for uploading</u>**.

The ELECTRONIC proposal submission must be fully uploaded to the Health Care Authority e-Procurement Portal by the submission deadline in Section II.B.6.

Any proposal that does not adhere to the requirements of this Section and **Section III.C.1 Proposal Content and Organization** may be deemed non-responsive and rejected on that basis.

B. PROPOSAL CONTENT AND ORGANIZATION

All proposals must be submitted as follows:

Organization of files/envelopes for electronic copy proposals:

1. Proposal Content and Organization

Direct reference to pre-prepared or promotional material may be used if referenced and clearly marked. Promotional material must be minimal. The proposal must be organized and indexed in the following format and must contain, at a minimum, all listed items in the sequence indicated.

Technical Proposal – **DO NOT INCLUDE ANY COST INFORMATION IN THE TECHNICAL PROPOSAL.**
1. Signed Letter of Transmittal
2. Signed Campaign Contribution Form
3. Table of Contents
4. Proposal Summary (Optional)
5. Response to Contract Terms and Conditions (from Section II.C.15)
6. Offeror's Additional Terms and Conditions (from Section II.C.16)
   a. Response to Specifications Organizational Experience
   b. Organizational References
   c. Oral Presentation (if applicable)
   d. Mandatory Specification
   e. Desirable Specification
7. Other Supporting Material (if applicable)

Cost Proposal:
1. Completed Cost Response Form (APPENDIX D)

Within each section of the proposal, Offerors should address the items in the order indicated above. All forms provided in this RFP must be thoroughly completed and included in the appropriate section of the proposal. **Any and all discussion of proposed costs, rates or expenses must occur ONLY in the Cost Proposal.**

A Proposal Summary may be included in Offeror's Technical Proposal, to provide the Evaluation Committee with an overview of the proposal; however, this material will not be used in the evaluation process unless specifically referenced from other portions of the Offeror’s proposal. **DO NOT INCLUDE COST INFORMATION IN THE PROPOSAL SUMMARY.**

2. Letter of Transmittal

Offeror’s proposal must be accompanied by the Letter of Transmittal Form located in Appendix E which must be completed and signed by an individual person authorized to obligate the company.

3. Campaign Contribution Disclosure Form

The Offeror must complete an unaltered Campaign Contribution Disclosure Form and submit a signed copy with the Offeror’s proposal. This must be accomplished whether or not an applicable contribution has been made. (See Appendix B)

4. Table of Contents

The table of contents must contain a list of all sections of the proposal and the corresponding page numbers.

5. Proposal Summary

The proposal summary must be three (3) pages or less. It shall provide the Evaluation Committee with an overview of the technical and business features of the proposal. This material will not be used in the evaluation process but may be used in public notifications regarding the successful offeror’s selection.

6. Response to Department’s Terms and Conditions

The offeror shall explicitly indicate acceptance of the General Requirements (Section II.C) and the Contract Terms and Conditions (Appendix C). As provided in Section II.C.15, should the offeror object to any of the Agency’s terms and conditions, as contained in Appendix C, the offeror must propose specific alternate language. The offeror must provide a brief discussion of the purpose and impact, if any, of each proposed change followed by the specific proposed alternate wording.

7. Offeror’s Additional Terms and Conditions

Offerors must submit with the proposal a complete set in writing of any additional terms and conditions they request to have included in a contract negotiated with the Department.

8. Response to Mandatory Specifications

The Mandatory Specifications may be found in Section IV of the RFP. This section contains information required in the submission of proposals. Offerors must respond in the form of a thorough narrative to each numbered requirement in the order in which they appear in this section. The offeror must identify, in full, the question being answered and its response to that question.

9. Suspension and Debarment Requirement Form

The offeror must complete the certification form in Appendix G to certify compliance with federal regulations relating to suspension and debarment.

10. Lobbying

No federal appropriated funds can be paid or will be paid, by or on behalf of the CONTRACTOR, or any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, or the making of any Federal grant, the making of any federal loan, the entering into of any cooperative agreement, or modification of any Federal contract, grant, loan, or cooperative agreement. If any funds other than federal appropriated funds have been paid or will be paid to any person influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection of this federal contract, grant, loan, or cooperative agreement, the CONTRACTOR shall complete and submit Standard Form LLL, “Disclosure Form to Report Lobbying,” in accordance with its instructions.

IV. SPECIFICATIONS

A. DETAILED SCOPE OF WORK

Background

The New Mexico Health Care Authority (HCA) administers the Primary Care Payment Reform (PCPR) Value-Based Payment (VBP) Program, a Medicaid State Directed Payment (SDP) program designed to strengthen New Mexico's primary care system through value-based payment methodologies that reward high-quality, accessible, and coordinated care for Medicaid members.

The PCPR VBP Program supports HCA's commitment to improving health outcomes, advancing health equity, strengthening primary care infrastructure, and increasing the sustainability of primary care practices throughout New Mexico. The program establishes standardized quality expectations, promotes care transformation, and aligns financial incentives among HCA, Turquoise Care Managed Care Organizations (MCOs), and participating primary care providers.

As the PCPR VBP Program continues to mature, HCA seeks to expand provider participation, strengthen stakeholder collaboration, enhance technical assistance, and support the evolution of the program toward increasingly sophisticated value-based payment arrangements. Achieving these objectives requires dedicated project management, program administration, stakeholder engagement, and subject matter expertise in Medicaid value-based payment programs.

Through this procurement, HCA seeks a qualified Contractor to provide comprehensive project management and program support services necessary to ensure the successful implementation, operation, evaluation, and continuous improvement of the PCPR VBP Program throughout the term of the Contract.

Purpose

The purpose of this procurement is to obtain comprehensive project management and program support services for the New Mexico Primary Care Payment Reform (PCPR) Value-Based Payment Program.

The Contractor shall provide professional services that support the planning, coordination, implementation, administration, stakeholder engagement, provider technical assistance, program evaluation, and continuous improvement of the PCPR VBP Program while ensuring alignment with HCA priorities, Medicaid managed care operations, and applicable federal requirements.

The Contractor shall work collaboratively with HCA staff, participating providers, Managed Care Organizations (MCOs), Tribal partners, contractors, consultants, and other stakeholders to support successful program implementation and ongoing program evolution.

Program Objectives

The Contractor shall support HCA in achieving the following objectives:

- Ensure effective implementation and ongoing administration of the PCPR VBP Program including coordination/collaboration with the HCA PCPR program administrator.
- Support HCA in advancing primary care value-based transformation
- Increase and maintain provider awareness, participation, and engagement in the PCPR Program.
- Provide comprehensive technical assistance that enables participating providers to successfully meet program requirements.
- Foster engagement and collaboration among HCA, MCOs, providers, Tribal partners, and other stakeholders.
- Identify opportunities to improve program performance, reduce PCPR participants' administrative burden, and strengthen provider participation.
- Administer and support continuous evaluation of program performance using qualitative and quantitative information.
- Develop recommendations that support program evolution and alignment with national best practices for Medicaid value-based payment programs.
- Assist HCA in maintaining compliance with applicable federal and state requirements related to Medicaid State Directed Payment programs.
- Promote transparency, accountability, and continuous quality improvement throughout all aspects of program implementation.
- Support primary care adoption of whole person integrated care.

Services shall include, at a minimum:

1. Project management and program administration;
2. Stakeholder engagement and communications;
3. Provider recruitment and outreach;
4. Provider technical assistance and education;
5. Planning and facilitation of meetings, conferences, and educational events;
6. Program operations support;
7. Program evaluation;
8. Continuous quality improvement;
9. Strategic planning and program design support;
10. Reporting and documentation; and
11. Other related services necessary to support the successful operation of the PCPR Program.

Guiding Principles

The Contractor shall perform all work in accordance with the following principles:

1. **Collaboration**: Promote collaborative partnerships among HCA, participating providers, MCOs, Tribal partners, professional associations, and other stakeholders.

2. **Transparency:** Maintain open communication regarding project status, risks, issues, timelines, deliverables, and recommendations.

3. **Continuous Improvement:** Use multiple data sources, including but not limited to Medicaid claims data, Managed Care Organization (MCO)-derived data, quality measure data, provider-

reported data, patient experience survey result, stakeholder feedback, and best practices to recommend improvements that strengthen program effectiveness and reduce unnecessary administrative burden.

4. **Provider-Centered Support:** Design technical assistance activities that are practical, timely, responsive, and tailored to the range of needs for participating providers.

5. **Equity:** Support HCA's efforts to improve access to high-quality primary care for underserved, frontier, rural, Tribal, and historically marginalized communities.

6. **Innovation:** Identify emerging best practices and innovative approaches in primary care that advance Medicaid value-based payment while remaining feasible for implementation in New Mexico.

Contractor Responsibilities
Throughout the Contract term, the Contractor shall:

A. Serve as HCA's primary project management contractor for the PCPR Program.

B. Maintain sufficient staffing and organizational capacity to perform all required services.

C. Designate a Project Director and Project Manager with authority to make operational decisions in consultation with the PCPR program manager.

D. Support HCA's Program Manager administration of the PCPR, including regular communication.

E. Coordinate activities with HCA staff and other contractors as directed

F. Assist the data intermediary to administer, manage, and analyze aggregate and provider specific performance data, including performance benchmarks recommendations

F. Develop annual work plans that identify activities, milestones, deliverables, timelines, responsible staff, and anticipated outcomes.

G. Maintain project documentation throughout the Contract.

H. Identify project risks and recommend mitigation strategies.

I. Monitor progress toward program objectives.

J. Provide recommendations to improve program efficiency and effectiveness.

K. Complete all deliverables within required timeframes.

L. Ensure continuity of operations throughout the Contract period.

M. Cooperate fully during audits, monitoring activities, and program reviews.

N. Participate in meetings requested by HCA.

O. Develop and maintain project management tools, including project schedules, action item logs, risk registers, decision logs, and issue tracking documents.

P. Prepare reports, presentations, and briefing materials as requested by HCA leadership.

Q. Coordinate activities across HCA divisions, Managed Care Organizations (MCOs), participating providers, contractors, and other stakeholders to ensure timely completion of project activities.

R. Maintain organized electronic records of all project documentation, meeting materials, communications, and deliverables throughout the Contract period.

S. Provide executive-level project support to HCA leadership, such as briefing materials, presentations, decision memoranda, talking points, legislative briefing materials, and responses to ad hoc information requests, as requested.

Deliverables

Deliverable	Frequency	Minimum Content
Annual Work Plan	Annually	Goals, milestones, timelines, staffing assignments, deliverables, risk mitigation strategies, and key activities including provider metric performance and trends.
Weekly Executive Summary	Weekly	One- to two-page summary for the Medicaid Director and HCA leadership highlighting accomplishments, upcoming activities, critical decisions, risks, issues requiring HCA action, and project status.
Monthly Status Report	Monthly	Progress toward objectives, completed activities, upcoming milestones, deliverable status, budget status (if applicable), risks, and mitigation activities.
Executive Briefing Materials	As Requested	Briefing papers, presentations, talking points, or decision memoranda prepared for HCA executive leadership.
Meeting Agendas	Prior to Each Meeting	Agenda, objectives, supporting materials, discussion topics, and decisions requested.
Meeting Notes and Action Items	Within five (5) business days after each meeting	Summary of discussions, decisions made, assigned action items, responsible parties, and due dates.
Action Item Log	Updated Weekly	Current status of all outstanding action items, responsible party, due date, and completion status.
Risk Register	Updated Monthly	Identification of project risks, likelihood, impact, mitigation strategies, responsible party, and status.
Communications Materials	As Needed	Provider notices, presentations, website content, educational materials, FAQs, and other communications approved by HCA.

Deliverable	Frequency	Minimum Content
Stakeholder Engagement Plan	Annually	Communication strategy, engagement activities, outreach schedule, and evaluation methods.
Provider Recruitment and Technical Assistance Plan	Annually	Recruitment strategy, outreach activities, participation goals, and progress measures. Technical assistance approach, training schedule, webinars, office hours, educational resources, and evaluation methods.
Conference and Workshop Plans	Prior to Each Event	Agenda, speakers, logistics, learning objectives, evaluation plan, and event timeline.
Conference Summary Report	Within 30 days after each event	Attendance, evaluation results, key discussion themes, lessons learned, and recommendations.
Annual Program Evaluation Report	Annually	Program accomplishments, challenges, stakeholder feedback, evaluation findings, recommendations for improvement, and proposed priorities for the following year.
Transition-Out Plan	At Contract End	Knowledge transfer plan, documentation inventory, transition schedule, and activities to ensure continuity of program operations.

B. TECHNICAL SPECIFICATIONS

1. Organizational Experience

Offeror **must**:

a) provide a brief description of relevant corporate experience with state government and private sector. The experience of all proposed subcontractors must be described. The narrative **must** thoroughly describe how the Offeror has supplied expertise for similar contracts and must include the extent of their experience implementing provider value-based payment transformation, and expertise and knowledge related to Project Management. All experience provided to private sector will also be considered;

b) provide a detailed resume/bio of all key personnel Offeror proposes to use in performance of the resulting contract, should Offeror be awarded. Key personnel is identified as any personnel who would be involved in providing services or expertise for this project. Offeror must include key personnel education, work experience, and relevant certifications/licenses.

c) describe at least two project successes and failures working on State Directed Payments or Value Based Payments. Include how each experience improved the Offeror's services.

2. Organizational References

Offeror must provide a list of a minimum of three (3) external references from similar projects/programs performed for private, state or large local government clients within the last three (3) years.

Offeror shall include the following Business Reference information as part of its proposals:

a) Client name;
b) Project description;
c) Project dates (starting and ending);
d) Technical environment (i.e., Project Management, Technical Assistance and Stakeholder Engagement);
e) Staff assigned to reference engagement that will be designated for work per this RFP; and
f) Client project manager name, telephone number, fax number and e-mail address.

Offeror is required to submit APPENDIX F, Organizational Reference Questionnaire ("Questionnaire"), to the business references it lists. **The business references must submit the Questionnaire directly to the designee identified in APPENDIX F. The business references must <u>not</u> return the completed Questionnaire to the Offeror.** It is the Offeror's responsibility to ensure the completed forms are submitted on or before the date indicated in Section II.A, Sequence of Events, for inclusion in the evaluation process.

Organizational References that are not received or are not complete, may adversely affect the Offeror's score in the evaluation process. Offerors are encouraged to specifically request that their Organizational References provide detailed comments.

3. Mandatory Specification

3.1 Project Management Experience

The Offeror shall demonstrate experience providing project management and program administration services for complex healthcare programs involving multiple stakeholders. The Offeror must have successfully managed at least three (3) projects within the past five (5) years that included project planning, stakeholder coordination, risk management, meeting facilitation, reporting, and implementation support.
The response shall include:

- Project name and description;
- Client name;
- Contract period;
- Scope of services provided;
- Key project outcomes; and
- Description of the Offeror's role and responsibilities.

3.2 Value-Based Payment Experience

The Offeror shall demonstrate experience supporting the design, implementation, administration, evaluation, or technical assistance of healthcare value-based payment (VBP) programs.
The Offeror must have provided VBP-related services for at least two (2) healthcare programs within the past three (3) years.
The response shall include:

- Program name and description;
- Client name;
- Contract period;
- Description of VBP activities performed;
- Populations served; and
- Outcomes achieved.

3.3 Stakeholder Engagement and Technical Assistance Experience
The Offeror shall demonstrate experience developing and implementing stakeholder engagement, provider outreach, education, training, or technical assistance programs for healthcare providers, health plans, government agencies, or healthcare organizations.
The Offeror shall describe at least two (2) projects completed within the past five (5) years that included:

- Stakeholder engagement activities;
- Development of educational or training materials;
- Facilitation of meetings, webinars, workshops, or conferences;
- Technical assistance services; and
- Methods used to evaluate effectiveness.

3.4 Proposed Project Management Approach
The Offeror shall submit a project management approach describing how they will perform the Scope of Work identified in Section IV.
At a minimum, the response shall address:

- Project governance structure;
- Staffing approach;
- Communication strategy;
- Risk management methodology;
- Stakeholder engagement approach;
- Reporting processes;
- Quality assurance activities; and
- Methods for monitoring progress toward project objectives.

The Offeror shall also provide a draft first-year work plan identifying major activities, milestones, deliverables, and timelines.

4. Desirable Specification

4.1 Medicaid State Directed Payment Experience

The Offeror has experience supporting Medicaid State Directed Payment (SDP) programs, including program design, implementation, operations, provider engagement, technical assistance, evaluation, or program management.
The Offeror should describe relevant experience, including:

- State Medicaid agency or managed care client;
- Type of SDP program;
- Services provided; and
- Outcomes achieved.

4.2 CMS Experience
The Offeror has experience working with the Centers for Medicare & Medicaid Services (CMS) on Medicaid initiatives, value-based payment programs, demonstration projects, waivers, directed payments, quality measurement, or related activities.
The Offeror should describe:

- Nature of CMS-related work;
- Role of the Offeror;
- Duration of the engagement; and
- Outcomes or deliverables produced.

4.3 Primary Care Innovation Experience
The Offeror has experience supporting primary care innovation initiatives, alternative payment models, patient-centered medical homes, integrated care models, or other primary care improvement programs.
The Offeror should describe:

- Program objectives;
- Services provided;
- Stakeholders involved; and
- Results achieved.

4.4 Tribal and Rural Healthcare Experience
The Offeror has experience working with Tribal healthcare organizations, Indian Health Service facilities, Tribal 638 facilities, rural healthcare providers, frontier healthcare providers, or medically underserved communities.
The Offeror should describe:

- Relevant project experience;
- Populations served;
- Engagement strategies utilized; and
- Outcomes achieved.

C. BUSINESS SPECIFICATIONS

1. Letter of Transmittal Form

The Offeror's proposal **must** be accompanied by the Letter of Transmittal Form located in APPENDIX E. The form **must** be completed and must be signed by the person authorized to obligate the company. **Failure to submit a signed form will result in Offeror's disqualification.**

2. **Campaign Contribution Disclosure Form**

The Offeror must complete an unaltered Campaign Contribution Disclosure Form and submit a signed copy with the Offeror's proposal. This must be accomplished whether or not an applicable contribution has been made. (See APPENDIX B). **Failure to complete and return the signed, unaltered form will result in Offeror's disqualification.**

3. **Oral Presentation**

If oral presentations are held, finalist Offeror(s) may be required to explain, demonstrate, detail, and/or clarify any aspect of its submitted proposal, to which the Evaluation Committee may ask questions and/or seek clarifications. Pursuant to Section II.B.9, Oral Presentations may held at the sole discretion of the Evaluation Committee.

4. **Cost**

Offerors must complete the Cost Response Form in Appendix D. Cost will be measured by the total cost per state fiscal year for implementation of their service. The cost should be inclusive of completing all of the specifications related Random Moment Surveys, Administrative Claiming & Direct Medical Service Cost Reporting & Settlement. All charges listed on Appendix D must be justified and evidence of need documented in the proposal.

V. EVALUATION

A. EVALUATION POINT SUMMARY

The following is a summary of evaluation factors with point values assigned to each. These weighted factors will be used in the evaluation of individual potential Offeror proposals by sub-category.

Evaluation Factors *(Correspond to Sections IV.B and IV.C)*		Points Available
B.	**Technical Specifications (700 Total Points)**	
B. 1.	Organizational Experience	250
B. 2.	Organizational References	90
B. 3.	Mandatory Specification	210
B. 4.	Desirable Specification	150
C.	**Business Specifications (300 Total Points)**	
C. 1.	Letter Of Transmittal	Pass/Fail
C. 2.	Campaign Contribution Disclosure Form	Pass/Fail
C. 3.	Oral Presentations	100
C. 4.	Cost	200
	TOTAL POINTS AVAILABLE	**1,000**

Table 1: Evaluation Point Summary

B. EVALUATION FACTORS

B.1 Organizational Experience (See Table 1)

Points will be awarded based on the thoroughness and clarity of Offeror's response in this Section. The Evaluation Committee will also weigh the relevancy and extent of Offeror's experience, expertise and knowledge; and of personnel education, experience and certifications/licenses. In addition, points will be awarded based on Offeror's candid and well-thought-out response to successes and failures, as well as the ability of the Offeror to learn from its failures and grow from its successes.

B.2 Organizational References (See Table 1)

Points will be awarded based upon an evaluation of the responses to a series of questions on the Organizational Reference Questionnaire (Appendix F). Offeror will be evaluated on references that show positive service history, successful execution of services and evidence of satisfaction by each reference. References indicating significantly similar services/scopes of work and comments provided by a submitted reference will add weight and value to a recommendation during the evaluation process. Points will be awarded for each individual response up to 1/3 of the total points for this category. Lack of a response will receive zero (0) points.

The Evaluation Committee may contact any or all business references for validation of information submitted. If this step is taken, the Procurement Manager and the Evaluation Committee must all be together on a conference call with the submitted reference so that the Procurement Manager and all members of the Evaluation Committee receive the same information. Additionally, the Agency reserves the right to consider any and all information available to it (outside of the Organizational Reference information required herein), in its evaluation of Offeror responsibility per Section II.C.18.

B.3 Mandatory Specifications (210 Points Total)

Project Management Experience (30 Points)
The Evaluation Committee will evaluate the Offeror's demonstrated experience managing complex healthcare projects involving multiple stakeholders, including project planning, governance, implementation, risk management, communications, and reporting.
Evaluation will consider:

- Experience managing projects of similar size and complexity.
- Experience serving government healthcare agencies or Medicaid programs.
- Demonstrated success in delivering projects on time and within scope.
- Experience coordinating multiple stakeholder groups.
- Quality and relevance of project examples.

Value-Based Payment Experience (100 Points)
The Evaluation Committee will evaluate the Offeror's experience designing, implementing, administering, evaluating, or providing technical assistance for healthcare value-based payment (VBP) programs.
Evaluation will consider:

- Relevance of VBP experience.
- Complexity of programs supported.
- Role performed by the Offeror.
- Demonstrated outcomes.
- Experience supporting Medicaid payment reform initiatives.

Stakeholder Engagement and Technical Assistance (30 Points)
The Evaluation Committee will evaluate the Offeror's experience facilitating stakeholder engagement, provider outreach, education, communications, and technical assistance.
Evaluation will consider:

- Stakeholder engagement strategies.
- Provider education experience.
- Meeting and conference facilitation.
- Technical assistance methodologies.
- Communication effectiveness

Proposed Project Management Approach (50 Points)

The Evaluation Committee will evaluate the Offeror's proposed methodology for implementing the Scope of Work.
Evaluation will consider:

- Quality of proposed work plan.
- Governance structure.
- Staffing plan.
- Communication strategy.
- Risk management approach.
- Reporting methodology.
- Ability to successfully achieve the Scope of Work objectives

B.4 Desirable Specifications (150 Points Total)

Medicaid State Directed Payment (SDP) Experience (40 Points)
Additional points will be awarded based on demonstrated experience supporting Medicaid State Directed Payment (SDP) programs.
Evaluation will consider:

- Number of SDP programs supported.
- Nature of services performed.
- Complexity of programs.
- Experience working with state Medicaid agencies.

Center for Medicare and Medicaid Services (CMS) (30 Points)
Additional points will be awarded for experience working with CMS on Medicaid initiatives, State Directed Payments, value-based payment programs, demonstrations, waivers, or quality initiatives.
Evaluation will consider:

- Direct CMS interaction.
- Nature of work performed.
- Relevance to the Scope of Work.

Primary Care Innovation Experience (50 Points)
Evaluation will consider:

- Scope of innovation activities.
- Healthcare settings.
- Demonstrated outcomes.

Tribal and Rural Healthcare Experience (30 Points)
Additional points will be awarded for demonstrated experience working with Tribal healthcare organizations, rural providers, frontier communities, or underserved populations.
Evaluation will consider:

- Depth of experience.
- Relevance to New Mexico.
- Stakeholder engagement strategies.

C.1 Letter of Transmittal (See Table 1)

Pass/Fail only. No points assigned.

C.2 Campaign Contribution Disclosure Form (See Table 1)

Pass/Fail only. No points assigned.

C.3 Oral Presentation (See Table 1)

Points will be awarded based on the quality, organization and effectiveness of communication of the information presented, as well as the professionalism of the presenters and technical knowledge of the proposed staff. Prior to Oral Presentation, Agency will provide the Offeror a presentation agenda.

C.4 Cost (See Table 1)

The offeror will be evaluated based on the total cost of implementation of the program for the 1-year contract period. The evaluation of each Offeror's cost proposal will be conducted using the following formula

$$\frac{\text{Lowest Responsive Offeror's Cost}}{\text{Each Offeror's Cost}} \quad \text{X} \quad \text{Available Award Points}$$

C. EVALUATION PROCESS

1. All Offeror proposals will be reviewed for compliance with the requirements and specifications stated within the RFP. Proposals deemed non-responsive will be eliminated from further consideration.

2. The Procurement Manager may contact the Offeror for clarification of the response as specified in Section II. B.7.

3. The Evaluation Committee may use other sources to perform the evaluation as specified in Section II. C.18.

4. Responsive proposals will be evaluated on the factors in Section IV, which have been assigned a point value in Section V. The responsible Offerors with the highest scores may be selected as finalist Offerors, based upon the proposals submitted. In accordance with §13-1-117 NMSA 1978, the responsible Offerors whose proposals are most advantageous to the State taking into consideration the Evaluation Factors in Section V will be recommended for award (as specified in Section II.B.12). Please note, however, that a serious deficiency in the response to any one factor may be grounds for rejection regardless of overall score.

APPENDIX A

ACKNOWLEDGEMENT OF RECEIPT FORM

APPENDIX A

REQUEST FOR PROPOSAL

PCPR Project Management
RFP# 27-630-8000-0008

ACKNOWLEDGEMENT OF RECEIPT FORM

This optional Acknowledgement of Receipt Form establishes a distribution list to be used for the distribution of written responses to questions, and/or any amendments to the RFP. Failure to return the Acknowledgement of Receipt Form does not prohibit potential Offerors from submitting a response to this RFP. However, by not returning the Acknowledgement of Receipt Form, the potential Offeror's representative shall not be included on the distribution list, and will be solely responsible for obtaining from the Procurement Library (Section I.G.) responses to written questions and any amendments to the RFP.

The information below will be used for all correspondence related to the Request for Proposal. Only one contact per Offeror is permitted.

ORGANIZATION: ____

CONTACT NAME: ____

TITLE: ________________________________ PHONE NO.: ____________________

E-MAIL: ____

ADDRESS: ____

CITY: __________________________ STATE: ________ ZIP CODE: _____________

Submit Acknowledgement of Receipt Form to:
To: Trisstin Maroney
E-mail: Trisstin.Maroney@hca.nm.gov
Subject Line: New Mexico Medicaid Primary Care Payment Reform RFP 27-630-8000-0008

APPENDIX B

CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to the Procurement Code, Sections 13-1-28, et seq. NMSA 1978 and § 13-1-191.1 NMSA 1978 (2006), as amended by Laws of 2007, Chapter 234, a prospective contractor subject to this section shall disclose all campaign contributions given by the prospective contractor or a family member or representative of the prospective contractor to an applicable public official of the state or a local public body during the two years prior to the date on which a proposal is submitted or, in the case of a sole source or small purchase contract, the two years prior to the date on which the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor or a family member or representative of the prospective contractor to the public official exceeds two hundred fifty dollars ($250) over the two-year period. A prospective contractor submitting a disclosure statement pursuant to this section who has not contributed to an applicable public official, whose family members have not contributed to an applicable public official or whose representatives have not contributed to an applicable public official shall make a statement that no contribution was made.

A prospective contractor or a family member or representative of the prospective contractor shall not give a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or during the pendency of negotiations for a sole source or small purchase contract.

Furthermore, a solicitation or proposed award for a proposed contract may be canceled pursuant to Section 13-1-181 NMSA 1978 or a contract that is executed may be ratified or terminated pursuant to Section 13-1-182 NMSA 1978 if a prospective contractor fails to submit a fully completed disclosure statement pursuant to this section; or a prospective contractor or family member or representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process.

The state agency or local public body that procures the services or items of tangible personal property shall indicate on the form the name or names of every applicable public official, if any, for which disclosure is required by a prospective contractor.

THIS FORM MUST BE INCLUDED IN THE REQUEST FOR PROPOSALS AND MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.

The following definitions apply:

“**Applicable public official**” means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

"**Campaign Contribution**" means a gift, subscription, loan, advance or deposit of money or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official's behalf for the purpose of electing the official to statewide or local office. "Campaign Contribution" includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

"**Family member**" means a spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law of (a) a prospective contractor, if the prospective contractor is a natural person; or (b) an owner of a prospective contractor;

"**Pendency of the procurement proces**s" means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

"**Prospective contractor**" means a person or business that is subject to the competitive sealed proposal process set forth in the Procurement Code [Sections 13-1-28 through 13-1-199 NMSA 1978] or is not required to submit a competitive sealed proposal because that person or business qualifies for a sole source or small purchase contract.

"**Representative of a prospective contractor**" means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

Name(s) of Applicable Public Official(s) if any:_________________________
(This field must be completed by the issuing State Agency. In most cases, the official identified will be the current Governor of New Mexico and Lieutenant Governor. If a local public body is using this template for their RFPs, it must complete this field with the applicable elected official(s).)

DISCLOSURE OF CONTRIBUTIONS BY PROSPECTIVE CONTRACTOR:

Contribution Made By: ____

Relation to Prospective Contractor: ____

Date Contribution(s) Made: ____
____

Amount(s) of Contribution(s) ____

Nature of Contribution(s) ______________________________

Purpose of Contribution(s) ______________________________

(Attach extra pages if necessary)

______________________ ______________________
Signature Date

____
Title (position)

--OR—

NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS ($250) WERE MADE to an applicable public official by me, a family member or representative.

______________________ ______________________
Signature Date

____
Title (Position)

APPENDIX C

DRAFT CONTRACT

The Agreement included in this Appendix C represents the contract/price agreement the Agency intends to use to make an award/awards. The State of New Mexico and the Agency reserve the right to modify the Agreement prior to, or during, the award process, as necessary.

STATE OF NEW MEXICO

(NAME OF AGENCY)
PROFESSIONAL SERVICES CONTRACT #__________________________

THIS AGREEMENT is made and entered into by and between the State of New Mexico, **NAME OF AGENCY**, hereinafter referred to as the "Agency," and **NAME OF CONTRACTOR**, hereinafter referred to as the "Contractor," and is effective as of the date set forth below upon which it is executed by the General Services Department/State Purchasing Division (GSD/SPD Contracts Review Bureau).

IT IS AGREED BETWEEN THE PARTIES:

1. <u>Scope of Work.</u>
The Contractor shall perform the following work:

2. <u>Compensation.</u>
A. The Agency shall pay to the Contractor in full payment for services satisfactorily performed at the rate of ______________ dollars ($__________) per hour (OR BASED UPON DELIVERABLES, MILESTONES, BUDGET, ETC.), such compensation not to exceed (AMOUNT), excluding gross receipts tax. The New Mexico gross receipts tax levied on the amounts payable under this Agreement totaling (AMOUNT) shall be paid by the Agency to the Contractor. **The total amount payable to the Contractor under this Agreement, including gross receipts tax and expenses, shall not exceed (AMOUNT). This amount is a maximum and not a guarantee that the work assigned to be performed by Contractor under this Agreement shall equal the amount stated herein. The parties do not intend for the Contractor to continue to provide services without compensation when the total compensation amount is reached. Contractor is responsible for notifying the Agency when the services provided under this Agreement reach the total compensation amount. In no event will the Contractor be paid for services provided in excess of the total compensation amount without this Agreement being amended in writing prior to those services in excess of the total compensation amount being provided.**

B. Payment is subject to availability of funds pursuant to the Appropriations Paragraph set forth below and to any negotiations between the parties from year to year pursuant to Paragraph

1, Scope of Work, and to approval by the GSD/SPD. All invoices MUST BE received by the Agency no later than fifteen (15) days after the termination of the Fiscal Year in which the services were delivered. Invoices received after such date WILL NOT BE PAID.

(—OR—)

(CHOICE – MULTI-YEAR)

A. The Agency shall pay to the Contractor in full payment for services satisfactorily performed pursuant to the Scope of Work at the rate of _____________ dollars ($___________) in FYXX (USE FISCAL YEAR NUMBER TO DESCRIBE YEAR; DO NOT USE FY1, FY2, ETC.). The New Mexico gross receipts tax levied on the amounts payable under this Agreement in FYXX totaling (AMOUNT) shall be paid by the Agency to the Contractor. **The total amount payable to the Contractor under this Agreement, including gross receipts tax and expenses, shall not exceed (AMOUNT) in FYXX.**

(REPEAT LANGUAGE FOR EACH FISCAL YEAR COVERED BY THE AGREEMENT -- USE FISCAL YEAR NUMBER TO DESCRIBE EACH YEAR; DO NOT USE FY1, FY2, ETC.).

B. Payment in FYXX, FYXX, FYXX, and FYXX is subject to availability of funds pursuant to the Appropriations Paragraph set forth below and to any negotiations between the parties from year to year pursuant to Paragraph 1, Scope of Work, and to approval by the GSD/SPD. All invoices MUST BE received by the Agency no later than fifteen (15) days after the termination of the Fiscal Year in which the services were delivered. Invoices received after such date WILL NOT BE PAID.

C. Contractor must submit a detailed statement accounting for all services performed and expenses incurred. If the Agency finds that the services are not acceptable, within thirty days after the date of receipt of written notice from the Contractor that payment is requested, it shall provide the Contractor a letter of exception explaining the defect or objection to the services, and outlining steps the Contractor may take to provide remedial action. Upon certification by the Agency that the services have been received and accepted, payment shall be tendered to the Contractor within thirty days after the date of acceptance. If payment is made by mail, the payment shall be deemed tendered on the date it is postmarked. However, the agency shall not incur late charges, interest, or penalties for failure to make payment within the time specified herein.

3. <u>Term.</u>

THIS AGREEMENT SHALL NOT BECOME EFFECTIVE UNTIL APPROVED BY THE GSD/SPD Contracts Review Bureau. This Agreement shall terminate on **(DATE)** unless terminated pursuant to paragraph 4 (Termination), or paragraph 5 (Appropriations). In accordance with NMSA 1978, § 13-1-150, no contract term for a professional services contract, including extensions and renewals, shall exceed four years, except as set forth in NMSA 1978, § 13-1-150.

4. <u>Termination.</u>

A. <u>Grounds</u>. The Agency may terminate this Agreement for convenience or cause. The Contractor may only terminate this Agreement based upon the Agency's uncured, material breach of this Agreement.

B. Notice; Agency Opportunity to Cure.

1. Except as otherwise provided in Paragraph (4)(B)(3), the Agency shall give Contractor written notice of termination at least thirty (30) days prior to the intended date of termination.

2. Contractor shall give Agency written notice of termination at least thirty (30) days prior to the intended date of termination, which notice shall (i) identify all the Agency's material breaches of this Agreement upon which the termination is based and (ii) state what the Agency must do to cure such material breaches. Contractor's notice of termination shall only be effective (i) if the Agency does not cure all material breaches within the thirty (30) day notice period or (ii) in the case of material breaches that cannot be cured within thirty (30) days, the Agency does not, within the thirty (30) day notice period, notify the Contractor of its intent to cure and begin with due diligence to cure the material breach.

3. Notwithstanding the foregoing, this Agreement may be terminated immediately upon written notice to the Contractor (i) if the Contractor becomes unable to perform the services contracted for, as determined by the Agency; (ii) if, during the term of this Agreement, the Contractor is suspended or debarred by the State Purchasing Agent; or (iii) the Agreement is terminated pursuant to Paragraph 5, "Appropriations", of this Agreement.

C. Liability. Except as otherwise expressly allowed or provided under this Agreement, the Agency's sole liability upon termination shall be to pay for acceptable work performed prior to the Contractor's receipt or issuance of a notice of termination; provided, however, that a notice of termination shall not nullify or otherwise affect either party's liability for pre-termination defaults under or breaches of this Agreement. The Contractor shall submit an invoice for such work within thirty (30) days of receiving or sending the notice of termination. *THIS PROVISION IS NOT EXCLUSIVE AND DOES NOT WAIVE THE AGENCY'S OTHER LEGAL RIGHTS AND REMEDIES CAUSED BY THE CONTRACTOR'S DEFAULT/BREACH OF THIS AGREEMENT.*

D. Termination Management. Immediately upon receipt by either the Agency or the Contractor of notice of termination of this Agreement, the Contractor shall: 1) not incur any further obligations for salaries, services or any other expenditure of funds under this Agreement without written approval of the Agency; 2) comply with all directives issued by the Agency in the notice of termination as to the performance of work under this Agreement; and 3) take such action as the Agency shall direct for the protection, preservation, retention or transfer of all property titled to the Agency and records generated under this Agreement. Any non-expendable personal property or equipment provided to or purchased by the Contractor with contract funds shall become property of the Agency upon termination and shall be submitted to the agency as soon as practicable.

5. Appropriations.

The terms of this Agreement are contingent upon sufficient appropriations and authorization being made by the Legislature of New Mexico for the performance of this Agreement. If sufficient appropriations and authorization are not made by the Legislature, this Agreement shall terminate immediately upon written notice being given by the Agency to the Contractor. The Agency's decision as to whether sufficient appropriations are available shall be accepted by the Contractor and shall be final. If the Agency proposes an amendment to the Agreement to unilaterally reduce funding, the Contractor shall have the option to terminate the Agreement or to agree to the reduced funding, within thirty (30) days of receipt of the proposed amendment.

6. Status of Contractor.

The Contractor and its agents and employees are independent contractors performing professional services for the Agency and are not employees of the State of New Mexico. The Contractor and its agents and employees shall not accrue leave, retirement, insurance, bonding, use of state vehicles, or any other benefits afforded to employees of the State of New Mexico as a result of this Agreement. The Contractor acknowledges that all sums received hereunder are reportable by the Contractor for tax purposes, including without limitation, self-employment and business income tax. The Contractor agrees not to purport to bind the State of New Mexico unless the Contractor has express written authority to do so, and then only within the strict limits of that authority.

7. Assignment.

The Contractor shall not assign or transfer any interest in this Agreement or assign any claims for money due or to become due under this Agreement without the prior written approval of the Agency.

8. Subcontracting.

The Contractor shall not subcontract any portion of the services to be performed under this Agreement without the prior written approval of the Agency. No such subcontract shall relieve the primary Contractor from its obligations and liabilities under this Agreement, nor shall any subcontract obligate direct payment from the Procuring Agency.

9. Release.

Final payment of the amounts due under this Agreement shall operate as a release of the Agency, its officers and employees, and the State of New Mexico from all liabilities, claims and obligations whatsoever arising from or under this Agreement.

10. Confidentiality.

Any confidential information provided to or developed by the Contractor in the performance of this Agreement shall be kept confidential and shall not be made available to any individual or organization by the Contractor without the prior written approval of the Agency.

11. Product of Service -- Copyright.

All materials developed or acquired by the Contractor under this Agreement shall become the property of the State of New Mexico and shall be delivered to the Agency no later than the termination date of this Agreement. Nothing developed or produced, in whole or in part, by the Contractor under this Agreement shall be the subject of an application for copyright or other claim of ownership by or on behalf of the Contractor.

12. Conflict of Interest; Governmental Conduct Act.

A. The Contractor represents and warrants that it presently has no interest and, during the term of this Agreement, 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.

B. The Contractor further represents and warrants that it has complied with, and, during the term of this Agreement, will continue to comply with, and that this Agreement complies with all applicable provisions of the Governmental Conduct Act, Chapter 10, Article 16 NMSA 1978.

Without in anyway limiting the generality of the foregoing, the Contractor specifically represents and warrants that:

1) in accordance with NMSA 1978, § 10-16-4.3, the Contractor does not employ, has not employed, and will not employ during the term of this Agreement any Agency employee while such employee was or is employed by the Agency and participating directly or indirectly in the Agency's contracting process;

2) this Agreement complies with NMSA 1978, § 10-16-7(A) because (i) the Contractor is not a public officer or employee of the State; (ii) the Contractor is not a member of the family of a public officer or employee of the State; (iii) the Contractor is not a business in which a public officer or employee or the family of a public officer or employee has a substantial interest; or (iv) if the Contractor is a public officer or employee of the State, a member of the family of a public officer or employee of the State, or a business in which a public officer or employee of the State or the family of a public officer or employee of the State has a substantial interest, public notice was given as required by NMSA 1978, § 10-16-7(A) and this Agreement was awarded pursuant to a competitive process;

3) in accordance with NMSA 1978, § 10-16-8(A), (i) the Contractor is not, and has not been represented by, a person who has been a public officer or employee of the State within the preceding year and whose official act directly resulted in this Agreement and (ii) the Contractor is not, and has not been assisted in any way regarding this transaction by, a former public officer or employee of the State whose official act, while in State employment, directly resulted in the Agency's making this Agreement;

4) this Agreement complies with NMSA 1978, § 10-16-9(A)because (i) the Contractor is not a legislator; (ii) the Contractor is not a member of a legislator's family; (iii) the Contractor is not a business in which a legislator or a legislator's family has a substantial interest; or (iv) if the Contractor is a legislator, a member of a legislator's family, or a business in which a legislator or a legislator's family has a substantial interest, disclosure has been made as required by NMSA 1978, § 10-16-7(A), this Agreement is not a sole source or small purchase contract, and this Agreement was awarded in accordance with the provisions of the Procurement Code;

5) in accordance with NMSA 1978, § 10-16-13, the Contractor has not directly participated in the preparation of specifications, qualifications or evaluation criteria for this Agreement or any procurement related to this Agreement; and

6) in accordance with NMSA 1978, § 10-16-3 and § 10-16-13.3, the Contractor has not contributed, and during the term of this Agreement shall not contribute, anything of value to a public officer or employee of the Agency.

C. Contractor's representations and warranties in Paragraphs A and B of this Article 12 are material representations of fact upon which the Agency relied when this Agreement was entered into by the parties. Contractor shall provide immediate written notice to the Agency if, at any time during the term of this Agreement, Contractor learns that Contractor's representations and warranties in Paragraphs A and B of this Article 12 were erroneous on the effective date of this Agreement or have become erroneous by reason of new or changed circumstances. If it is later determined that Contractor's representations and warranties in Paragraphs A and B of this Article 12 were erroneous on the effective date of this Agreement or have become erroneous by reason of new or changed circumstances, in addition to other remedies available to the Agency and notwithstanding anything in the Agreement to the contrary, the Agency may immediately terminate the Agreement.

D. All terms defined in the Governmental Conduct Act have the same meaning in this Article 12(B).

13. Amendment.

A. This Agreement shall not be altered, changed or amended except by instrument in writing executed by the parties hereto and all other required signatories.

B. If the Agency proposes an amendment to the Agreement to unilaterally reduce funding due to budget or other considerations, the Contractor shall, within thirty (30) days of receipt of the proposed Amendment, have the option to terminate the Agreement, pursuant to the termination provisions as set forth in Article 4 herein, or to agree to the reduced funding.

14. Merger.

This Agreement incorporates all the Agreements, covenants and understandings between the parties hereto concerning the subject matter hereof, and all such covenants, Agreements and understandings have been merged into this written Agreement. No prior Agreement or understanding, oral or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

15. Penalties for violation of law.

The Procurement Code, NMSA 1978 §§ 13-1-28 through 13-1-199, imposes civil and criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for illegal bribes, gratuities and kickbacks.

16. Equal Opportunity Compliance.

The Contractor agrees to abide by all federal and state laws and rules and regulations, and executive orders of the Governor of the State of New Mexico, pertaining to equal employment opportunity. In accordance with all such laws of the State of New Mexico, the Contractor assures that no person in the United States shall, on the grounds of race, religion, color, national origin, ancestry, sex, age, physical or mental handicap, or serious medical condition, spousal affiliation, sexual orientation or gender identity, be excluded from employment with or participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity performed under this Agreement. If Contractor is found not to be in compliance with these requirements during the life of this Agreement, Contractor agrees to take appropriate steps to correct these deficiencies.

17. Applicable Law.

The laws of the State of New Mexico shall govern this Agreement, without giving effect to its choice of law provisions. Venue shall be proper only in a New Mexico court of competent jurisdiction in accordance with NMSA 1978, § 38-3-1 (G). By execution of this Agreement, Contractor acknowledges and agrees to the jurisdiction of the courts of the State of New Mexico over any and all lawsuits arising under or out of any term of this Agreement.

18. Workers Compensation.

The Contractor agrees to comply with state laws and rules applicable to workers compensation benefits for its employees. If the Contractor fails to comply with the Workers Compensation Act and applicable rules when required to do so, this Agreement may be terminated by the Agency.

19. Records and Financial Audit.

The Contractor shall maintain detailed time and expenditure records that indicate the date; time, nature and cost of services rendered during the Agreement's term and effect and retain them for a period of three (3) years from the date of final payment under this Agreement. The records shall be subject to inspection by the Agency, the General Services Department/State Purchasing Division and the State Auditor. The Agency shall have the right to audit billings both before and after payment. Payment under this Agreement shall not foreclose the right of the Agency to recover excessive or illegal payments

20. Indemnification.

The Contractor shall defend, indemnify and hold harmless the Agency and the State of New Mexico from all actions, proceeding, claims, demands, costs, damages, attorneys' fees and all other liabilities and expenses of any kind from any source which may arise out of the performance of this Agreement, caused by the negligent act or failure to act of the Contractor, its officers, employees, servants, subcontractors or agents, or if caused by the actions of any client of the Contractor resulting in injury or damage to persons or property during the time when the Contractor or any officer, agent, employee, servant or subcontractor thereof has or is performing services pursuant to this Agreement. In the event that any action, suit or proceeding related to the services performed by the Contractor or any officer, agent, employee, servant or subcontractor under this Agreement is brought against the Contractor, the Contractor shall, as soon as practicable but no later than two (2) days after it receives notice thereof, notify the legal counsel of the Agency and the Risk Management Division of the New Mexico General Services Department by certified mail.

21. New Mexico Employees Health Coverage.

A. If Contractor has, or grows to, six (6) or more employees who work, or who are expected to work, an average of at least 20 hours per week over a six (6) month period during the term of the contract, Contractor certifies, by signing this agreement, to have in place, and agree to maintain for the term of the contract, health insurance for those employees and offer that health insurance to those employees if the expected annual value in the aggregate of any and all contracts between Contractor and the State exceed $250,000 dollars.

B. Contractor agrees to maintain a record of the number of employees who have (a) accepted health insurance; (b) declined health insurance due to other health insurance coverage already in place; or (c) declined health insurance for other reasons. These records are subject to review and audit by a representative of the state.

C. Contractor agrees to advise all employees of the availability of State publicly financed health care coverage.

22. **Invalid Term or Condition.**

If any term or condition of this Agreement shall be held invalid or unenforceable, the remainder of this Agreement shall not be affected and shall be valid and enforceable.

23. **Enforcement of Agreement.**

A party's failure to require strict performance of any provision of this Agreement shall not waive or diminish that party's right thereafter to demand strict compliance with that or any other provision. No waiver by a party of any of its rights under this Agreement shall be effective unless express and in writing, and no effective waiver by a party of any of its rights shall be effective to waive any other rights.

24. **Notices.**

Any notice required to be given to either party by this Agreement shall be in writing and shall be delivered in person, by courier service or by U.S. mail, either first class or certified, return receipt requested, postage prepaid, as follows:

To the Agency:
[insert name, address and email].

To the Contractor:
[insert name, address and email].

25. **Authority.**

If Contractor is other than a natural person, the individual(s) signing this Agreement on behalf of Contractor represents and warrants that he or she has the power and authority to bind Contractor, and that no further action, resolution, or approval from Contractor is necessary to enter into a binding contract.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date of signature by the GSD/SPD Contracts Review Bureau below.

By: ____ Date:_____________
Agency

By: ____ Date:_____________
Agency’s Legal Counsel – Certifying legal sufficiency

By: ____ Date:_____________
Agency’s Chief Financial Officer

By: ____ Date:_____________
Contractor

The records of the Taxation and Revenue Department reflect that the Contractor is registered with the Taxation and Revenue Department of the State of New Mexico to pay gross receipts and/or compensating taxes.

ID Number: **00-000000-00-0**

By: ____ Date:_____________
Taxation and Revenue Department

This Agreement has been approved by the GSD/SPD Contracts Review Bureau:

By: ____ Date:_____________
GSD/SPD Contracts Review Bureau

Scope of Work

Background
The New Mexico Health Care Authority (HCA) administers the Primary Care Payment Reform (PCPR) Value-Based Payment (VBP) Program, a Medicaid State Directed Payment (SDP) program designed to strengthen New Mexico's primary care system through value-based payment methodologies that reward high-quality, accessible, and coordinated care for Medicaid members.

The PCPR VBP Program supports HCA's commitment to improving health outcomes, advancing health equity, strengthening primary care infrastructure, and increasing the sustainability of primary care practices throughout New Mexico. The program establishes standardized quality expectations, promotes care transformation, and aligns financial incentives among HCA, Turquoise Care Managed Care Organizations (MCOs), and participating primary care providers.

As the PCPR VBP Program continues to mature, HCA seeks to expand provider participation, strengthen stakeholder collaboration, enhance technical assistance, and support the evolution of the program toward increasingly sophisticated value-based payment arrangements. Achieving these objectives requires dedicated project management, program administration, stakeholder engagement, and subject matter expertise in Medicaid value-based payment programs.

Through this procurement, HCA seeks a qualified Contractor to provide comprehensive project management and program support services necessary to ensure the successful implementation, operation, evaluation, and continuous improvement of the PCPR VBP Program throughout the term of the Contract.

Program Objectives
The Contractor shall support HCA in achieving the following objectives:

- Ensure effective implementation and ongoing administration of the PCPR VBP Program.
- Support HCA in advancing primary care transformation through value-based payment methodologies.
- Increase provider awareness, participation, and engagement in the PCPR Program.
- Provide comprehensive technical assistance that enables participating providers to successfully meet program requirements.
- Foster collaboration among HCA, MCOs, providers, Tribal partners, and other stakeholders.
- Identify opportunities to improve program performance, reduce administrative burden, and strengthen provider participation.
- Support continuous evaluation of program performance using qualitative and quantitative information.
- Develop recommendations that support program evolution and alignment with national best practices for Medicaid value-based payment programs.
- Assist HCA in maintaining compliance with applicable federal and state requirements related to Medicaid State Directed Payment programs.
- Promote transparency, accountability, and continuous quality improvement throughout all aspects of program implementation.

Services shall include, at a minimum:

12. Project management and program administration;
13. Stakeholder engagement and communications;
14. Provider recruitment and outreach;
15. Provider technical assistance and education;
16. Planning and facilitation of meetings, conferences, and educational events;
17. Program operations support;
18. Program evaluation;
19. Continuous quality improvement;
20. Strategic planning and program design support;
21. Reporting and documentation; and
22. Other related services necessary to support the successful operation of the PCPR Program.

Guiding Principles

The Contractor shall perform all work in accordance with the following principles:

1. Collaboration: Promote collaborative partnerships among HCA, participating providers, MCOs, Tribal partners, professional associations, and other stakeholders.

2. Transparency: Maintain open communication regarding project status, risks, issues, timelines, deliverables, and recommendations.

3. Continuous Improvement: Use data, stakeholder feedback, and best practices to recommend improvements that strengthen program effectiveness and reduce unnecessary administrative burden.

4. Provider-Centered Support: Design technical assistance activities that are practical, timely, responsive, and tailored to the needs of participating providers.

5. Equity: Support HCA's efforts to improve access to high-quality primary care for underserved, frontier, rural, Tribal, and historically marginalized communities.

6. Innovation: Identify emerging best practices and innovative approaches that advance Medicaid value-based payment while remaining feasible for implementation in New Mexico.

Contractor Responsibilities

Throughout the Contract term, the Contractor shall:

A. Serve as HCA's primary project management contractor for the PCPR Program.
B. Maintain sufficient staffing and organizational capacity to perform all required services.
C. Designate a Project Director and Project Manager with authority to make operational decisions.
D. Maintain regular communication with HCA's Program Manager.
E. Coordinate activities with HCA staff and other contractors as directed.
F. Develop annual work plans that identify activities, milestones, deliverables, timelines, responsible staff, and anticipated outcomes.
G. Maintain project documentation throughout the Contract.
H. Identify project risks and recommend mitigation strategies.
I. Monitor progress toward program objectives.
J. Provide recommendations to improve program efficiency and effectiveness.
K. Complete all deliverables within required timeframes.
L. Ensure continuity of operations throughout the Contract period.
M. Cooperate fully during audits, monitoring activities, and program reviews.
N. Participate in meetings requested by HCA.
O. Develop and maintain project management tools, including project schedules, action item logs, risk registers, decision logs, and issue tracking documents.
P. Prepare reports, presentations, and briefing materials as requested by HCA leadership.
Q. Coordinate activities across HCA divisions, Managed Care Organizations (MCOs), participating providers, contractors, and other stakeholders to ensure timely completion of project activities.
R. Maintain organized electronic records of all project documentation, meeting materials, communications, and deliverables throughout the Contract period.

S. Provide executive-level project support to HCA leadership, such as briefing materials, presentations, decision memoranda, talking points, legislative briefing materials, and responses to ad hoc information requests, as requested.

Deliverables

Deliverable	Frequency	Minimum Content
Annual Work Plan	Annually	Goals, milestones, timelines, staffing assignments, deliverables, risk mitigation strategies, and key activities.
Weekly Executive Summary	Weekly	One- to two-page summary for the Medicaid Director and HCA leadership highlighting accomplishments, upcoming activities, critical decisions, risks, issues requiring HCA action, and project status.
Monthly Status Report	Monthly	Progress toward objectives, completed activities, upcoming milestones, deliverable status, budget status (if applicable), risks, and mitigation activities.
Executive Briefing Materials	As Requested	Briefing papers, presentations, talking points, or decision memoranda prepared for HCA executive leadership.
Meeting Agendas	Prior to Each Meeting	Agenda, objectives, supporting materials, discussion topics, and decisions requested.
Meeting Notes and Action Items	Within five (5) business days after each meeting	Summary of discussions, decisions made, assigned action items, responsible parties, and due dates.
Action Item Log	Updated Weekly	Current status of all outstanding action items, responsible party, due date, and completion status.
Risk Register	Updated Monthly	Identification of project risks, likelihood, impact, mitigation strategies, responsible party, and status.
Communications Materials	As Needed	Provider notices, presentations, website content, educational materials, FAQs, and other communications approved by HCA.
Stakeholder Engagement Plan	Annually	Communication strategy, engagement activities, outreach schedule, and evaluation methods.
Provider Recruitment and Technical Assistance Plan	Annually	Recruitment strategy, outreach activities, participation goals, and progress measures. Technical assistance approach, training schedule, webinars, office hours, educational resources, and evaluation methods.
Conference and Workshop Plans	Prior to Each Event	Agenda, speakers, logistics, learning objectives, evaluation plan, and event timeline.
Conference Summary Report	Within 30 days after each event	Attendance, evaluation results, key discussion themes, lessons learned, and recommendations.
Annual Program Evaluation Report	Annually	Program accomplishments, challenges, stakeholder feedback, evaluation findings, recommendations for improvement, and proposed priorities for the following year.

Deliverable	Frequency	Minimum Content
Transition-Out Plan	At Contract End	Knowledge transfer plan, documentation inventory, transition schedule, and activities to ensure continuity of program operations.

APPENDIX D

COST RESPONSE FORM

Proposer Name: ______________________________________

RFP Title: PCPR Project Management

RFP Number: 27-630-8000-0008

Cost Proposal Requirements
Offerors shall submit a complete Cost Proposal that includes either:

- **Option 1:** A line-item budget using Appendix D, identifying costs by budget category; **or**
- **Option 2:** A deliverables-based budget that allocates costs by major deliverable identified in the Scope of Work.

Regardless of the format selected, the Offeror shall submit a detailed Budget Narrative describing how all proposed costs were calculated and demonstrating that all costs are reasonable, necessary, and directly related to the performance of the Scope of Work.

HCA reserves the right to request additional budget details or supporting documentation during the evaluation or contract negotiation process.

Budget Narrative
Regardless of whether the Offeror elects to submit a line-item budget or a deliverables-based budget, the Budget Narrative shall clearly demonstrate that all costs necessary to perform the Scope of Work are included and that no costs have been duplicated across budget categories or deliverables.

Budget Line Item	Description	Budget Amount
Personnel & Fringe Benefits	Salaries and wages for all staff assigned to the project. Employee benefits associated with project personnel, including payroll taxes, retirement, health insurance, leave, and other benefits.	**$**
Professional Services/Subcontractors	Costs for subcontractors, consultants, and other contracted professional services	**$**
Travel	In-state and out-of-state travel, lodging, mileage, per diem, and related expenses necessary to perform the Scope of Work	**$**
Facilities & Meeting Expenses	Office space, meeting space, facility rental, utilities, conference room rental, and other facility-related expenses necessary to perform the Scope of Work.	**$**

Budget Line Item	Description	Budget Amount
Supplies	Office supplies, educational materials, printing supplies, and consumable items necessary to perform the Scope of Work.	**$**
Equipment	Purchases of equipment necessary to perform the Scope of Work that are not included under Information Technology.	**$**
Information Technology	Technology costs necessary to support project activities including software, hardware, licensing fees, data systems, project management tools, and other technology resources directly related to providing services.	**$**
Training & Professional Development	Cost associated with workforce training, continuing education, certifications, and professional development activities	**$**
Operating Expenses	Day-to-day operational costs necessary to support the project, including telecommunications, accounting services, insurance, licenses and permits, accreditation, and other allowable operating expenses.	**$**
Administrative/Indirect Costs	Indirect or overhead costs that cannot be readily assigned to a single project activity but are necessary to support performance of the Contract.	**$**
Other Direct Costs	Allowable direct costs not included elsewhere. Provide a description for each item.	**$**
TOTAL COST PROPOSAL		**$**

Option 1 Instructions:

For each budget line item below, Offerors shall provide a narrative describing how the proposed budget amount was calculated, including assumptions, methodologies, and any applicable percentages.

Personnel

- List each proposed staff position assigned to the project.
- Include annual salary or hourly rate, Full-Time Equivalent (FTE) or percentage of effort, and total annual cost.
- Describe each position's primary responsibilities as they relate to the Scope of Work.

Fringe Benefits

- Identify each fringe benefit included (e.g., health insurance, retirement, payroll taxes, leave, workers' compensation).
- Provide the fringe benefit rate or methodology used to calculate costs.
- Explain any differences in fringe benefit rates among personnel, if applicable.

Professional Services/Subcontractors

- Identify each subcontractor or consultant.
- Describe the services to be provided.
- Explain why subcontracted services are necessary.
- Describe how the proposed costs were calculated.

Travel

- Describe anticipated travel necessary to perform the Scope of Work.
- Include estimated number of trips, destinations, purpose of travel, mileage, lodging, meals, registration fees, and any other travel-related costs.
- State any assumptions used to develop the travel budget.

Facilities and Meeting Expenses

- Describe facility-related expenses, including office space, meeting space, conference room rental, utilities, and event venue costs.
- Explain how costs were estimated.
- Identify any meeting, workshop or conference expenses included in this category.

Supplies

- Describe office supplies, printing, educational materials, conference materials, and other consumable items necessary to perform the Scope of Work.
- Explain how the proposed costs were estimated.

Equipment

- Identify any equipment necessary to perform the Scope of Work.
- Explain why the equipment is necessary.
- Include estimated purchase or lease costs.

Information Technology

- Describe technology-related expenses, including software licenses, project management systems, virtual meeting platforms, hardware, data management tools, and other technology resources.
- Explain how costs were determined.

Training and Professional Development

- Describe staff training, certifications, continuing education, conferences, or professional development activities included in the budget.
- Explain how the proposed costs support successful performance of the Contract.

Operating Expenses

- Describe operating expenses such as telecommunications, internet services, postage, shipping, insurance, accounting services, licenses, permits, banking fees, and other operational costs.
- Explain how each cost supports the Scope of Work.

Administrative/Indirect Costs

- Identify the indirect cost rate or methodology used.
- Describe the expenses included within the indirect cost calculation.
- If no indirect costs are proposed, indicate "Not Applicable."

Other Direct Costs

- Itemize each proposed cost.
- Explain why the cost is necessary.
- Describe how the amount was calculated.
- Costs included in this category shall not duplicate costs included elsewhere in the budget.

Deliverable	**Proposed Annual Fee**
Transition and Implementation Plan	**$**
Project Management and Program Administration	**$**
Executive Support and Leadership Briefings	**$**
Stakeholder Engagement and Communications	**$**
Provider Recruitment and Outreach	**$**
Provider Technical Assistance and Education	**$**
Meetings, Learning Collaboratives, Conferences, & Workshops	**$**
Program Operations Support	**$**
Strategic Planning and Program Design Support	**$**
Program Evaluation and Continuous Quality Improvement	**$**
Required Reporting and Documentation	**$**
Other Deliverables (Specify)	**$**
TOTAL COST PROPOSAL	**$**

Option 2 Instructions:

- Fees shall include all personnel, fringe benefits, travel, supplies, equipment, subcontractors, administrative costs, profit, and all other costs necessary to complete each deliverable.
- Offerors shall provide a Budget Narrative explaining how each proposed fee was developed.
- If a deliverable is included within another deliverable's fee, clearly identify this in the Budget Narrative to avoid duplication of costs.

Certification
By signing below, the Offeror certifies that:

- The proposed costs are complete and accurate.
- All costs necessary to perform the Scope of Work are included.
- Costs are not duplicated across budget categories.
- The Offeror understands reimbursement is limited to approved contract amounts.

Authorized Representative:

Title: ____

Signature: ____

Date: ____

APPENDIX E

Letter of Transmittal Form

Please complete this form in its entirety. Failure to **sign and/or submit** this form will result in the disqualification of Offeror's proposal.

RFP#: 27-630-8000-0008

1. **Identify the following information for the submitting organization**:

Offeror Name	
Mailing Address	
Telephone	
FED TIN#	
NM BTIN#	

2. **Identify the individual(s) authorized by the organization to (A) contractually obligate, (B) negotiate, and/or (C) clarify/respond to queries on behalf of this Offeror**:

	A **Contractually Obligate**	**B** **Negotiate***	**C** **Clarify/Respond to Queries***
Name			
Title			
E-mail			
Telephone			

* If the individual identified in Column A also performs the functions identified in Columns B & C, then no response is required for those Columns. If separate individuals perform the functions in Columns B and/or C, they must be identified.

-

3. **Will any subcontractor/s be used in the performance of any resultant contract?** (Select one):
____ No.
____ Yes. Identify subcontractor/s: ____

4. **Will any other entity/-ies (such as a State Agency, reseller, etc., that is not a subcontractor identified in #3 above) be used in the performance of any resultant contract**? (Select one)
____ No.
____ Yes. Identify entity/-ies: ____

By signing the form below, the Authorized Signatory attests to the accuracy and veracity of the information provided on this form, and explicitly acknowledges the following:

- On behalf of the submitting-organization identified in item #1, above, I accept the Conditions Governing the Procurement, as required in Section II.C.1. of this RFP;
- I concur that submission of our proposal constitutes acceptance of the Evaluation Factors contained in Section V of this RFP; and
- I acknowledge receipt of any and all amendments to this RFP, if any.

Sign: ____ Date: _____________________
(*Must be signed by the individual identified in item #2.A, above.*)

APPENDIX F

ORGANIZATIONAL REFERENCE QUESTIONNAIRE

The State of New Mexico, as a part of the RFP process, requires Offerors to list a minimum of three (3) organizational references in their proposals. The purpose of these references is to document Offeror's experience relevant to the Section IV.A, Detailed Scope of Work in an effort to evaluate Offeror's ability to provide goods and/or services, performance under similar contracts, and ability to provide knowledgeable and experienced staffing.

Offeror is required to send the following Organizational Reference Questionnaire to each business reference listed in its proposal, as per Section IV.B.2. The business reference, if it chooses to respond, is required to submit its response to the Organizational Reference Questionnaire directly to: Trisstin Maroney at Trisstin.Maroney@hca.nm.gov by September 14, 2026 at 5 pm MST/MDT for inclusion in the evaluation process. The Questionnaire and information provided will become a part of the submitted proposal. Businesses/Organizations providing references may be contacted for validation of content provided therein.

RFP # 27-630-8000-0008
ORGANIZATIONAL REFERENCE QUESTIONNAIRE
FOR:

____

(Name of Offeror/Vendor)

This form is being submitted to your company for completion as a reference for the organization listed above. Submit this Questionnaire to the State of New Mexico, Health Care Authority via e-mail at:

Name: Trisstin Maroney
Email: Trisstin.Maroney@hca.nm.gov

Forms must be submitted no later than September 14, 2026 at 5 pm MST/MDT**,** and **must not** be returned to the organization requesting the reference. References are **strongly encouraged** to provide comments in response to organizational ratings. The comments you provide will help the State evaluate the above-referenced Offeror's service history, successful execution of services and evidence of customer/client satisfaction.

For questions or concerns regarding this form, please contact the State of New Mexico **Procurement Manager** at 505-618-0318 or Trisstin.Maroney@hca.nm.gov. When contacting the Procurement Manager, include the Request for Proposal number provided at the top of this page.

Organization providing reference	
Contact name and title/position	
Contact telephone number(s)	
Contact e-mail address	
Project description	
Project dates (start and end dates)	
Technical environment for the project your providing a reference (i.e., Project Management, Technical Assistance and Stakeholder Engagement);	

QUESTIONS:

1. In what capacity have you worked with this vendor in the past?
COMMENTS:

2. How would you rate this organization's knowledge and expertise?
____ (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)
COMMENTS:

3. How would you rate the organization's flexibility relative to changes in the project scope and timelines?

_____ (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

COMMENTS:

4. What is your level of satisfaction with hard-copy materials produced by the vendor?

_____ (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable, N/A = Not applicable)

COMMENTS:

5. How would you rate the dynamics/interaction between vendor personnel and your staff?

_____ (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

COMMENTS:

6. Who are/were the vendor's principal representatives involved in your project and how would you rate them individually? Would you, please, comment on the skills, knowledge, behaviors or other factors on which you based the rating?

_____ (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable)

Name: ____Rating:

Name: ____Rating:

Name: ____Rating:

Name: ____Rating:

COMMENTS:

7. How satisfied are/were you with the products developed by the vendor?

_____ (3 = Excellent; 2 = Satisfactory; 1 = Unsatisfactory; 0 = Unacceptable, N/A = Not applicable)

COMMENTS:

8. With which aspect(s) of this vendor's services are/were you most satisfied?

COMMENTS:

9. With which aspect(s) of this vendor's services are/were you least satisfied?

COMMENTS:

10. Would you recommend this vendor's services to your organization again?

COMMENTS: