This is a summary of the questions submitted in response to the Public Outreach and Education RFP published by the Department of Commerce for the Health Insurance Exchange. It is the Department's intention, as indicated on page 5 of the RFP, to provide the responses to questions to all firms or individuals that requested copies of the RFP. Questions have been organized into topic groupings.

Budget

Questions #1: What is the budget?
There were numerous questions asking what our budget is for each segment or the project as a whole. We are anticipating proposals that fall within a typical cost of the industry for work of this sort. Your replies will help us confirm a suitable budget for this project.

Questions #2: When do you anticipate receiving federal funding for segments two and three?
There were also a few questions regarding if and when federal funding would be in place for the branding and public relations segments. On February 29, the state received a federal grant of $26 million to fund the design and development of an exchange. A portion of that grant was to be allocated for outreach efforts, specifically segments 2 and 3 of this RFP. It was necessary for us to adjust the amount of the grant by $3.4 million. That adjustment did affect the outreach allocation and we have reorganized the order and timing of the work within this RFP.

We now anticipate little or no overlap between the segments. The segments will be awarded and performed in the following order: market research, public relations and branding. We anticipate the market research segment to commence in April and last 8-10 weeks; public relations would commence in June and run through the end of 2012; branding would not begin until fall and would last approximately 6 weeks.

We anticipate that the currently awarded federal grant funding is sufficient for market research and public relations segments, contingent upon the proposed bids falling within our assumed budget. The branding segment would fall under subsequent grant funding.

Question #3: Is there a rule against submitting tiered budgets?
No

Timing

Questions # 4-8:

- To meet the timeline associated with the branding and PR work in particular, does the state foresee any issues with receiving approval in a timely manner to accommodate an April 2012 start date?
- The RFP states that the Market Research segment will be completed by May 15, 2012, and the Branding Segment to be completed by May 30, 2012. How will the research findings guide the design decisions if the deliverables are this close together?
- Can you please clarify the work commencement date of May 2012 for the PR segment: Is that when work/planning begins or when initial execution/outreach is anticipated to begin (knowing research and branding are still being completed in May 2012)?
- Are their specific or particular factors driving the market research timeline with a target completion of May 15?

- Are their specific or particular factors driving the brand development timeline of 4-6 weeks with a target completion of May 30?

Please refer to the answer for question #2 as the response for this set of questions.

Question #9: Are there specific or particular factors driving the overall timeline?
Yes. Exchanges must have a strategy for outreach and marketing in order to be compliant with federal standards. For more information on those federal standards, please go to http://www.healthcare.gov/law/resources/regulations/guidance-to-states-on-exchanges.html.

Question #10: Your plans for public relations indicate this work is to begin in May 2012 and conclude by year-end 2012, with a possibility of a one-year renewal. Plan enrollment in the Minnesota Health Insurance Exchange is not expected to commence until the Fall of 2013. At what point in 2012 or 2013 do you expect plans for the Minnesota Health Insurance Exchange to become sufficiently concrete (e.g., with types and names of plan coverage to be offered, geographic scope, etc.) to enable the public relations campaign to discuss the Exchange as a reality, and not just as a to-be-determined concept?
As you have correctly identified, the elements of the Exchange will be under development for 2012. The public relations segment of the RFP is intended to help us establish a baseline strategy for exchange communications and begin a social media campaign that will educate based on some foundation principles and key known attributes. So we foresee the public relations campaign for 2012 to be educational in nature.

Question #11: Have you documented the decision-making and approval process that will be in instituted to help meet timelines and still include the multiple internal/external stakeholders involved? Who holds the final decision-making authority?
Yes. An evaluation team, comprised of representatives from the Departments of Commerce, Health and Human Services, will select the vendors for this RFP.

Question #12: Is the deadline still next Monday?
Yes.

<u>**General**</u>

Question #13: With regard to parties answering the RFP – how many agencies responded, and who are they?
We had requested to review the RFP from 55 entities. Per state policy, we do not release the names of companies or individuals.

Question #14: What would be considered a win in terms of metrics for each of the segments (research, branding, PR)?
Evaluation will be based on the factors and weighting laid out in the RFP.

Question #15: How will you define success for each segment (research, branding, PR)?
If you mean success for being selected as the vendor of choice, see the response above. If you mean success in terms of the work performed, the criteria would be based on achieving the goals set for each segment.

Question #16: What partnerships with community groups already exist that can be leveraged for this campaign?
We have built relationships with a number of community groups. Those relationships can be tapped into for this project and we will share that information with the selected vendor(s).

Question #17: Can you provide an org chart so we can get a better understanding of how the Exchange team and partners work together?
Certainly. The document is included at the end of the questions.

Question #18: Have those who will be building and running the Minnesota Health Insurance Exchange been hired? If so, please describe the background and expertise of these individuals in the health insurance industry.
Please refer to the organizational chart. Additional information on specific individuals from state agencies who will be closely involved in this project will be shared with the selected vendor(s) at the appropriate time.

Question #19: How do you define "innovative creativity design?" Any examples you can share?
Each evaluation team member brings a unique perspective to the process and would define it differently. That is precisely why we have assembled a team representing the three state agencies that are working together to develop the Exchange.

Question #20: Can you provide examples or ranges of "changing polices or business rules" as referenced under element 5 on page 6 of the RFP?
Many elements of the Exchange have yet to be finalized. For example, the governance structure of the Exchange has not been decided. The determination whether that would be a state agency, a non-profit or a combination of the two may affect the framework or policies or business rules under which this project would operate.

Question #21: Does the cost proposal count against the page limits outlined on page 5 (15 pages per segment or 45 pages total)?
No.

Question #22: Will the Minnesota Health Insurance Exchange Advisory Task Force have a role in the selection of a vendor(s) to fulfill the market research, branding and public relations effort? A role in the oversight of this work? If so, please describe in further detail.
No, the Task Force does not have a role in the selection of the vendor or oversight over the work. However, a technical work group under the advisory task force may be a resource for the vendor to get feedback on its work plan, results and performance.

Question #23: How is the Minnesota Health Insurance Exchange ensuring that it serves as a broad-based, independent provider of health insurance information, rates and policies, as opposed to simply being a sales and marketing conduit for a few very large health insurance providers?
The role of the Exchange as a disseminator of health care information has not yet been decided. To the extent that assumptions about that role is material to your response, you should articulate the linkage between those assumptions and your proposal.

Question #24: In Dec. 2011, your department released for public view and comment five prototypes for the Minnesota Health Insurance Exchange. That preview site is now closed. Are there plans to re-open this site? Can you provide a summary of the comments you received about these prototypes?
A summary of comments gathered during this process will be shared with the selected vendor(s).

Question #25: Will all three segments of this RFP be awarded at the same time?
Not necessarily. Each segment will be evaluated separately starting with market research, then public relations and branding. Depending on the number of proposals received, evaluation for each separate segment may conclude simultaneously.

Question #26: Are detailed bios of team members acceptable versus resumes?
Yes.

Question #27: Is it acceptable to include work samples with all 8 copies of the proposal submitted such that these work samples adhere to other proposal guidelines (8.5x11, 11 point font, 1 inch margins)? Is the single set of work samples reserved for larger presentations of work samples?
The RFP calls for one set of work samples to be submitted.

Question #28: If a firm is applying for multiple segments, can it combine its response into a single RFP response?
No. Segments will be evaluated separately.

Question #29: Are there rules against using visuals in the proposal?
No.

Question #30: Is the State expecting the respondent to propose solution ideas within their response in the form of spec work? Or does "proposed solution" mean that we should describe our approach or process?
Proposed solution is referring to your approach and/or process. Including specific ideas for this project or samples of past achievements will help us gauge if a vendor is the best fit for our particular needs.

Question #31: If the State ends up selecting more than one vendor for the three segments, will the multiple parties collaborate as a group throughout the process?
We are open to that possibility.

<u>Market Research</u>

Question #32: How do you define small businesses?
A number of folks asked this question. The Exchange is initially open to small businesses with 50 or fewer employees. Each state may decide to extend that threshold to 100 or fewer employees. Minnesota has not yet determined the threshold.

Question #33: Diverse, underserved audiences
- For the qualitative research with consumers, do you want to include Spanish speaking groups?
- You mention diverse, underserved communities for focus group participation. Do you have specific underserved communities or diverse communities you want included, such as non-English speakers,

individuals on Medicaid or people of color? If so, please specify as this will impact recruiting methods and costs.
- The RFP mentions the need to reach audiences of diverse backgrounds and hard-to-reach populations. Can you provide more definition and a prioritization of these audiences?

We foresee the Exchange as a place where previously uninsured consumers would go to find affordable health insurance. According to a recent report from the Minnesota Department of Health, the uninsured rate for Minnesota has stayed at the 9% level for over 2 years. That group includes a number of ethnic backgrounds and we would want to include them in the market research. However, that is only one segment of consumers we have identified for the Exchange. The market research would need to include all audience segments. The exact number and specific make-up of focus groups and survey sampling will be determined in discussions with the selected vendor.

Question #34: Cell phone surveying
- In the statewide survey of consumers, would you like to include cell phones in addition to landlines?
- Do you anticipate using a cell phone sample for the consumer study?
- Do you want to have the phone survey include cell phone users as well as landline users?

We are open to this possibility.

Question #35: Do you want the consumer survey to be conducted by phone only, or is a web only survey or is a combination a possibility?
We are open to a combination as a possibility.

Question #36: What is the Orientation phase and what is the likely length?
Orientation is viewed as the stage where the selected vendor and primary project stakeholders meet to further discuss the scope of the research. This stage is where the vendor would learn what information has already been gathered or referenced by Exchange staff. We anticipate this stage would only take 1 week at most.

Question #37: Do you have any existing research on the audiences that you are willing to share? Any general demographics, psychographics?
Yes, we will share all background information we have gathered or know of.

Question #38: Will the state provide lists for the consumer and small employers/businesses research?
No. However, we will provide access to stakeholders and partnerships we have already created.

Questions #39-45: Sampling
- Will there be quotas on the consumer survey (i.e. by geography, income, age)? If so, what would they be?
- Will there be qualifying criteria on the consumer survey (i.e. age limits, health care needs, or insurance experience)? If so, what would they be?
- Are there any screening critieria for participation in the consumer survey or focus groups, such as only uninsured Minnesotans or will all adults in Minnesota qualify?
- Will there be quotas on the business survey (i.e. by geography or industry type)? If so, what would they be?
- Will there be qualifying criteria on the business survey. If so, what would they be? (i.e. specific parameters for what constitutes a small business)

- Have you quantified the number of Greater Mn vs. metro focus groups and/or have you identified specific cities for Greater Minnesota focus groups?
- What is the State's definition of rural and urban for this study?

For the market research, we are seeking a representative sampling based on Minnesota demographics as illustrated by the data from the 2010 census. We will work with the selected vendor(s) to develop sampling criteria that is mutually agreed upon and will lead us to arriving at a statistically sound sample.

Question #46: Often times when using both qualitative and quantitative methodologies in a study one is conducted before the other in order to provide insight to better target that phase. If that is desired here the timeframe laid out would make that nearly impossible. Is there any latitude in the timetable spelled out in the proposal if it can be shown that the tight timeframe negatively impacts the ability to conduct the study in the best manner possible?
Yes. Please see the answer for Question #2.

Question #47: Will you purchase the random digit dial lists for the consumer survey and the small business list, or should the responder include these costs in the RFP?
You should include those costs in the RFP.

Question #48: Will there be stimuli (e.g. prototypes) shown at the focus groups? If yes, who will be responsible for developing the stimuli?
We are open to the use of stimuli. The Exchange and the vendor will mutually agree which party is better suited to provide such stimuli.

Question #49: What role, if any, would the research vendor play in Segments 2 and 3 if those proceed?
We anticipate less cross-over based on the revised timeline. We would expect, should there be more than one vendor selected, that they be open to sharing pertinent information gained as part of this specific project/RFP.

Question #50: Will the vendors chosen for Segments 2 and 3 have any role in the research formulation phase or the market research? If so, what would that role be?
We are open to collaboration amongst the vendors selected should there be more than one.

Question #51: Would any potential branding and/or PR partner be able to contribute and help shape the market research even if the selected branding and/or PR partner is not executing the market research?
We are open to collaboration amongst the vendors selected should there be more than one.

Questions #52-53:
- In the RFP the use of both qualitative and quantitative research methods are requested with the words 'such as' ….. Is this intended to mean the 3 bullets that follow are <u>examples</u> of what could be included in the proposal, or are these (800 random sample phone survey of consumers, 250 random sample of small employers, minimum 10 focus groups) the specific research you want included in the response to this RFP?
- Will the State of MN provide the necessary information for market research suppliers to weight the survey data, if needed?

The bullets serve as a baseline of the scope of the research. We are open to adapting specific items to more closely coincide with the sampling requirement should that be deemed necessary. (see #39-44)

Question #54: Given the timeline, the qualitative and quantitative processes will need to overlap. Please define the relationship and timing between the qualitative focus groups and the quantitative surveys. What is the purpose and intent of the focus groups? To define the language, perceptions and knowledge of potential respondents for the surveys? Or to flesh out the results of the surveys in terms of underlying motivations and gain an understanding of particular respondent segments post-survey?
Please refer to previously answered questions.

Question #55: Do you require use of focus group facilities, when available?
Perhaps. We will work with the selected vendor to identify appropriate locations depending on what resources may be available through already developed stakeholder partnerships.

Question #56: Do you require transcripts or video of the focus groups?
At minimum, we require transcripts. You are welcome to include video in your proposal. We would ask that the cost for it be clearly identified in you cost proposal.

Questions #57-58: key informants
- You mention community and industry leaders and key informants as focus group or in-depth interview participants. Will you provide a list of these people or how will they be identified for contact/participation?
- Will the State provide the names and contact information for key informant interviews?
- For the qualitative portion, who do you envision would be targeted for the potential one-on-one "key informant" interviews?

Yes, we will identify key informants. We would anticipate that a majority would be contacted by the vendor for more in-depth information gathering.

Question #59: Will the state approve the payment of incentives to focus group participants?
You would need to build that into your proposal if you feel it is necessary to the project.

Question #60: For the small business employer survey, is it also important that data be analyzed by urban and rural business ownership?
Yes.

Question # 61: For the qualitative research component of this RFP, is it also important that the focus groups and one-on-one interviews be distributed to represent both the urban and rural populations?
Yes.

Question # 62: The RFP mentions the importance of the supplier knowing the current MN health insurance distribution system. Will the State provide information for the market research agency to study and have a "full understand of the existing health insurance distribution system in MN, including the current role of health insurances, agents and brokers, and entities that assist with Medicare enrollment?"
If the selected vendor(s) do not have this background already, we will work with them to provide appropriate information and guidance.

Branding

Question #63: Branding, specific deliverables includes the brand promise, positioning strategy, key messages and a log representation. We assume at this stage you are looking for the process, framework and budget to create these, not the actual work product, as it will need to be informed by the market research.
Please refer to the answer for question #2.

Question #64: What brands and brand campaigns do you admire and why? Can you share some examples, both in the healthcare space and outside of the industry?
Each evaluation team member brings a unique perspective to the process and would have a different opinion.

Question #65: The deliverables in Segment 2 mention 'logo representation'. Can the State describe/elaborate by what is meant by this?
We mean a logo.

Question #66: Are there certain applied forms that should be included as part of the brand development phase?
No, but, naturally, they should be considered.

Public Relations

Question #67: Does experience with statewide public information programs need to be confined to Minnesota, or is experience in other states acceptable?
Experience in other states is helpful. However, we view Minnesota as having unique characteristics. Experience with developing work aimed at a Minnesota audience is viewed as favorable.

Question #68: Is paid advertising an option that should be addressed or is that at the discretion of the bidder?
At the discretion of the bidder.

Question #69: Is there a PR campaign that you really admire? If so, which one(s)? And why? Is there an example of a social media engagement that you really admire? If so, which one(s)? And why?
Each evaluation team member brings a unique perspective to the process and would have a different opinion.

Question #70: Is there a particular audience the exchange wants to reach through social media (i.e. the end users or influencers)?
Both.

Question #71: Will the exchange be staffed to handle its own online community management, or should we include that as part of the social media strategy portion of the public relations segment?
The proposal should consider three options for this function: completely outsourced to the vendor; begun by the vendor but then transitioned to the Exchange; and fully owned by the Exchange.

Question #72: What has been the extent of any proactive PR efforts to date? The Exchange has been in the news; how would you rate the coverage to date?
We have crafted our current communications based on realities in resources and the surrounding landscape. We would be more interested in what an applicant's viewpoint is on our efforts and how they could be improved.

Question # 73: Will you rely on the agency partner to handle campaign measurement? If not, how will this be handled?
Yes, we will rely on the selected vendor.

Question #74: What would be considered "dream" media placements for the Exchange?
Those that reach the target audience and achieve the intended results.