

DVHA Routing Form

Revision Date 5/1/12

Type of Agreement: Contract Agreement #: 21446 Form of Agreement: Amendment Amendment #: 2

Name of Recipient: GMMB, Inc. Vendor #: 311008

Program Manager: Sean Sheehan Phone #: 802-878-7952

Agreement Manager: Emily Trantum Phone #: 802-879-5946

Brief Explanation of Agreement: **This amendment will increase the maximum amount, extend the contract term, replace Attachment A, and replace Attachment B.**

Start Date: 2/10/2012 End Date: 7/31/2014 Maximum Amount: \$1,812,588.00

Amendments Only: Maximum Prior Amount: \$669,700.00 Percentage of Change: 171.00%

Bid Process (Contracts Only): Standard Simplified Sole Source Statutory Master Contract SOW

Funding Source

ACA Exchange 93.525	\$1,812,588.00		

Contents of Attached Packet

- | | | |
|--|---|--|
| <input checked="" type="checkbox"/> AA-14 | <input checked="" type="checkbox"/> Attachments A, B, C & F | <input type="checkbox"/> Attachment G - Academic Research |
| <input type="checkbox"/> Sole Source Memo | <input checked="" type="checkbox"/> Attachment D - Modifications to C & F | <input type="checkbox"/> MOU |
| <input checked="" type="checkbox"/> Qualitative/Justification Memo | <input type="checkbox"/> Attachment E - Business Associate Agreement | <input checked="" type="checkbox"/> Other: Base and Amendment 1 |

Reviewer	Reviewer Initials	Date In	Date Out
DVHA Grant & Contract Administrator	Kate Jones	K.J.	
DVHA BO	Jill Gould	J.G.	
DVHA Commissioner or Designee	Mark Larson, Commissioner	M.L.	
AHS Attorney General	Seth Steinzor, AAG	S.S.	
Following Approvals for Contracts Only:			
AHS CIO	Darin Prail	D.P.	
AHS Central Office	Martha Giglio	M.G.	
AHS Secretary	Dixie Henry, Deputy Secretary	D.H.	

Vision Account Codes:

FFATA Entry Grant Tracking Module Vision PO #: _____ Initials & Date: _____ Approval & B/C: _____

STATE OF VERMONT CONTRACT SUMMARY AND CERTIFICATION - - - - - Form AA-14 (8/22/11)

Note: All sections are required. Incomplete forms will be returned to department.

I. CONTRACT INFORMATION:

Agency/Department: AHS/ DVHA Contract #: 21446 Amendment #: 2
 Vendor Name: GMMB, Inc. VISION Vendor No: 311008
 Vendor Address: 1010 Williston Avenue, Suite 800, Washington D.C. 2007
 Starting Date: 2/10/2012 Ending Date: 7/31/2014 Amendment Date: 4/5/2013
 Summary of agreement or amendment: This Amendment will increase the maximum amount, extend the contract term, replace Attachment A, and replace Attachment B

II. FINANCIAL INFORMATION

Maximum Payable: \$1,812,588.00 Prior Maximum: \$ 669,700.00 Prior Contract # (If Renewal):
 Current Amendment: \$1,142,888.00 Cumulative amendments: \$ 1,142,888.00 % Cumulative Change: 171.00 %
 Business Unit(s): 3410; ; - [notes:] VISION Account(s): 507600;

III. PERFORMANCE INFORMATION

Does this Agreement include Performance Measures tied to Outcomes and/or financial reward/penalties? Yes No
 Estimated Funding Split: G-Fund % S-Fund % F-Fund 100.00 % GC-Fund % Other %

III. PUBLIC COMPETITION

The agency has taken reasonable steps to control the price of the contract or procurement grant and to allow qualified organizations to compete for the work authorized by this contract. The agency has done this through:
 Standard bid or RFP Simplified Bid Sole Sourced Qualification Based Selection Statutory

IV. TYPE OF AGREEMENT & PERFORMANCE INFORMATION

Check all that apply: Service Personal Service Architect/Engineer Construction Marketing
 Information Technology Other, describe:

V. SUITABILITY FOR CONTRACT FOR SERVICE

Yes No n/a If this is a Personal Service contract, does this agreement meet all 3 parts of the "ABC" definition of independent contractor? (See Bulletin 3.5) If NO, then contractor must be paid through Payroll

VI. CONTRACTING PLAN APPLICABLE:

Are one or more contract or terms & conditions provisions waived under a pre-approved Contracting Plan? Yes No

VII. CONFLICT OF INTEREST

By signing below, I certify that no person able to control or influence award of this contract had a pecuniary interest in its award or performance, either personally or through a member of his or her household, family, or business.

Yes No Is there an "appearance" of a conflict of interest so that a reasonable person may conclude that this party was selected for improper reasons: (If yes, explain)

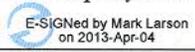
VIII. PRIOR APPROVALS REQUIRED OR REQUESTED

Yes No Agreement must be approved by the Attorney General under 3 VSA §311(a)(10) (personal service)
 Yes No I request the Attorney General review this agreement as to form
 No, already performed by in-house AAG or counsel: _____ (initial)
 Yes No Agreement must be approved by the Comm. of DII; for IT hardware, software or services and Telecommunications over \$100,000
 Yes No Agreement must be approved by the CMO; for Marketing services over \$15,000
 Yes No Agreement must be approved by Comm. Human Resources (privatization and retiree contracts)
 Yes No Agreement must be approved by the Secretary of Administration

IX. AGENCY/DEPARTMENT HEAD CERTIFICATION; APPROVAL

D.P. E.B. M.G.

I have made reasonable inquiry as to the accuracy of the above information:

 Date _____ Agency / Department Head		 Date _____ Agency Secretary or Other Department Head (if required)	
 Date _____ Approval by Attorney General		Date _____ Approved by Commissioner of Human Resources	
Date _____ CIO		 Date _____ CMO	
Date _____		 Date _____ Secretary of Administration	

MEMORANDUM

TO: Jeb Spaulding, Secretary of Administration
THROUGH : Doug Racine, Secretary of Agency of Human Services (AHS) **D.H.**
FROM: Mark Larson, Commissioner, Department of Vermont Health Access (DVHA) **M.L.**
DATE: Thursday, April 4, 2013
RE: GMMB, Inc Contract #21446, Amendment 2

This memo requests an expedited review for contract #21446 with GMMB, Inc. This is one of several contracts the Department of Vermont Health Access (DVHA) executed to assist with the second year of planning, designing, and development of Vermont's Health Benefit Exchange under the Affordable Care Act (ACA). The original GMMB contract was developed through a competitive procurement process. We ask to amend and extend this contract to bring us through the final development and implementation work as well as our critical launch and open enrollment period.

GMMB is uniquely positioned in at least three ways to support the Exchange outreach and education effort. First, the outreach and education deliverables in the Exchange's Level 2 Grant directly build off of the work in the Level 1 Grant to design the Navigator program and plan the outreach and education campaign. Having delivered the Level 1 work, GMMB knows the details and has the specific expertise no other vendor has. Second, GMMB has deep first-hand experience of Vermont, and how to promote health coverage in Vermont, as it led the outreach and education campaign for Catamount Health. Third, GMMB is involved in Exchange education and outreach efforts in other states and will thereby enable Vermont to tap the most successful and cutting edge strategies from other parts of the country, rather than re-creating the wheel.

It is also important to note that the funding agency, the Centers for Medicare & Medicaid Services, has strongly encouraged states to leverage vendors with expertise in developing Exchanges around the country. They underscore the point that tight, federally mandated timelines and milestones inherent in the grant require ongoing consistency and cohesion in staffing to provide smooth results this spring and summer when the education and outreach campaign needs to hit the ground. GMMB, Inc Contract #21446, Amendment 2 provides this consistency and cohesion.

Vermont Health Connect is responsible for preparing a quarter million Vermonters to use the Exchange to enroll in health coverage starting in October 2013. In order to succeed in this ambitious goal, DVHA must manage a far-reaching outreach and education campaign. Several pieces of this campaign have a complex and long-reaching timelines, including to:

State of Vermont
Department of Vermont Health Access
312 Hurricane Lane, Suite 201
Williston VT 05495-2807
dvha.vermont.gov

[Phone] 802-879-5900
[Fax] 802-879-5651

Agency of Human Services

- **Produce and distribute educational materials** – Educational materials need to be in the hands of Vermont’s businesses, community leaders, and individuals by late spring. For this to happen, the materials must be designed in March and April. Hundreds of partnerships also need to be established in the spring in order to reach Vermonters in places they frequent, such as doctors’ offices, pharmacies, schools and grocery stores.
- **Design and deliver Navigator program** - Consumer Assistance Organizations need to be contracted and certified and Navigators need to be trained in June to begin fulfilling their summer community outreach obligations. In order for this to happen, the organizations must be selected in the spring. The content for trainings, the metrics for assessing progress, a process for recertification and decertification, and a process for evaluating proposals that come in response to the RFP all must be delivered by spring as well.
- **Plan and execute awareness campaign** - Vermonters need to begin to see and hear more about Vermont Health Connect through television, radio and online channels. In order for television ads to be produced in May, scripts and storyboards must be delivered in April. For that to happen, creative platforms must be delivered in March, a continuation of the current work.

As demonstrated above, there is significant work on a tight, federally-mandated timeline. GMMB’s expertise in the realm of the Affordable Care Act and Health Benefit Exchanges, their experience with health care outreach and education campaigns in Vermont and, most importantly, their Level 1 work on this project over the last year, makes GMMB, Inc Contract #21446, Amendment 2 essential to the success of Vermont Health Connect.

The funding for this contract will be covered by the 100% Federal Funding Participation for the term of the contract. This contract complies with all mandatory provisions of AOA Bulletin 3.5. DVHA looks forward to approval of this amendment.

Approval:  _____
JEB SPAULDING, AOA DATE

AMENDMENT

It is agreed by and between the State of Vermont, Department of Vermont Health Access (hereafter called the "State") and GMMB, Inc. (hereafter called the "Contractor") that the contract on the subject of personal services for development and implementation of processes and criteria for developing a comprehensive outreach and education program for the Health Benefits Exchange (HBE), effective February 10, 2012, is hereby amended effective April 5, 2013, as follows:

1. By deleting Section 3 (Maximum Amount) on page 1 of 23 of the Base Contract, and substituting in lieu thereof the following Section 3:

3. Maximum Amount. In consideration of the services to be performed by Contract, the State agrees to pay Contractor, in accordance with the payment provisions specified in Attachment B, a sum not to exceed \$1,812,588.

2. By deleting Section 4 (Contract Term) as amended on 1 of 6 of Amendment 1, and substituting in lieu thereof the following Section 4:

4. Contract Term. The period of the Contractor's performance shall begin on February 10, 2012 and end on July 31, 2014.

3. By adding to Attachment A on page 3 of 23 of the base agreement and the corresponding sections as amended on page 1 of 6 of Amendment 1, and adding the following:

Materials Development

The Contractor shall engage and partner with existing and emerging stakeholders in the region that have been approved by the State to research and develop materials and communicate important information about Vermont Health Connect. Throughout the materials development process, the Contractor shall engage key stakeholders to understand their needs, build upon feedback provided by Stakeholders throughout the State.

The Contractor shall work with the Outreach & Education Business Leads for the State to develop a strategic brief that identifies the creative platform for the materials. The strategic brief shall define the State's strategy and guide the development of the outreach program materials by identifying the problem to be solved, target audiences, the call to action, barriers, overall mission, and desired values and tone. This strategic brief will reflect all research to date on the most effective approaches, visuals and language.

Contractor	Draft and present strategic brief	Apr 2013
State	Review and provide feedback on strategic brief	Apr 2013
Contractor	Finalize strategic brief	Apr 2013
		\$9,391

Develop and Produce Advertising Materials

The Contractor shall bring together a seasoned account team with health coverage experience – both nationally and on the state level. Sean Sheehan Outreach and Education Project Director for the Health Benefits Exchange, DVHA shall serve as the State’s primary contact. The Contractor shall assign, Alison Betty of GMMB Inc. as the primary contact for this Contract. Such contacts may be changed by written notice to the other party.

Script Television Ads and Develop Storyboards

The Contractor shall draft and present a series of scripts (6-8) that include descriptions of both the visual and audio elements of the television ads. The Contractor shall produce no more than two television ads ahead of Vermont Health Connect’s launch to target different audiences. Both ads would aim to raise awareness about Vermont Health Connect and encourage people to get online and enroll.

The State shall provide feedback, and will select four scripts and edit and refine as necessary. The Contractor shall engage an artist to create storyboards that use drawings to represent the key “frames” of the ads.

Contractor	Draft and present 6-8 television ad scripts	Apr 2013
State	Review and provide feedback on scripts	Apr 2013
Contractor	Revise four scripts	Apr 2013
State	Approve scripts for storyboard phase	Apr 2013
Contractor	Identify key frames, develop and present storyboards	Apr 2013
State	Review and provide feedback on storyboards	Apr 2013
Contractor	Revise storyboards if necessary	Apr 2013
Contractor	Present scripts/storyboards to stakeholders	Apr 2013
ALL	Assess stakeholder feedback	Apr 2013
Contractor	Finalize storyboards	Apr 2013
		\$71,055

Test Storyboards

The Contractor shall engage PerryUndem to form focus group testing of creative concepts and television ad storyboards. The Contractor shall oversee the testing of four storyboard concepts in focus groups with target audiences. Similar to the focus groups conducted in 2012, the Contractor shall conduct a total of eight mini focus groups – four in Burlington and four in a location to be determined in collaboration with the State and must approved by the State.

In addition the Contractor shall test advertising concepts among:

- Small business owners
- Uninsured young adults
- Vermonters under 400% FPL, including Catamount/VHAP beneficiaries
- Uninsured (or recently uninsured) Vermonters

In lieu of testing printed materials in a separate set of focus groups, and to ensure materials are included in the focus group research, the Contractor shall include additional language testing to ensure that printed materials are similarly rooted in research.

Contractor	Confirm focus group logistics (locations, participants)	Apr 2013
Contractor	Draft and present focus group guide	Apr 2013
State	Review and provide feedback on focus group guide	Apr 2013
Contractor	Finalize focus group guide	Apr 2013
ALL	Attend focus groups	Apr 2013
Contractor	Draft and present focus group report	Apr 2013
State	Review and provide feedback on focus group report	Apr 2013
Contractor	Finalize focus group report	Apr 2013
		\$120,079

Produce Television Ads

Informed by the research and additional feedback the Contractor shall produce television ads based on the preferred ad concepts. The Contractor will create a maximum of four ads – at least one with the primary focus of raising awareness, and at least one with a call to action during open enrollment. The State will approve production budgets in writing prior to the start of production.

Though the filming of each ad will be determine by its script, the Contractor will secure shoot locations in Vermont. The Contractor will work in conjunction with the State’s Business Leads to cast actors, actresses and/or voice-over talent.

Following the shoot, the Contractor will go into production of the ads. The Contractor will present a “rough cut” of each ad for the State’s feedback and then will make a final “fine cut” that will be suitable for release to television stations (in both high definition and regular definition, depending on each station’s preferences) and the web.

The Contractor shall also allocate resources for modification of two television ads for use in subsequent years, if necessary (i.e. re-recording voice-over and updating visuals to reflect new open enrollment dates).

The Contractor shall assist in uploading the videos to the Vermont Health Connect YouTube account and providing an embed code that can be shared with partners and other state agencies who wish to feature the video content on their websites. The State will work with internal resources to ensure all social media are in compliance with State processes and regulations.

Contractor	Present final scripts	Apr 2013
State	Approve final scripts	Apr 2013
Contractor	Present location, casting options	May 2013
State	Approve location, casting options	May 2013
Contractor	Schedule shoot, crew, etc.	May 2013
Contractor	Film ad(s)	May 2013
Contractor	Produce and present rough cut of ad(s)	May 2013
State	Review and provide feedback on ad(s)	May 2013
Contractor	Revise ad(s) and present fine cut	June 2013
State	Review and provide feedback on fine cut	June 2013
Contractor	Finalize ad(s) and prepare YouTube file(s)	June 2013
		\$226,573

Script and Produce 2014 Television Ad

In support of previous advertising and in effort to capture Vermonters that did not enroll in the first year, the Contractor shall produce a new ad leading up to and during 2014 open enrollment, the Contractor stands to capture the attention of Vermonters who did not enroll the previous year. In addition, the newly created ad shall communicate re-enrollment information to those already enrolled. The Contractor shall attempt to incorporate a testimonial sharing their experience from the previous enrollment period.

Contractor	Draft and present 2 television ad scripts	Jan 2014
State	Review and provide feedback on scripts	Feb 2014
Contractor	Revise one script	Feb 2014
State	Review and approve script	Feb 2014
Contractor	Present location, casting options	Apr 2014
State	Approve location, casting options	Apr 2014
Contractor	Schedule shoot, crew, etc.	Apr 2014
Contractor	Film	Apr 2014
Contractor	Produce and present rough cut of ad	Apr 2014
State	Review and provide feedback on ad	May 2014
Contractor	Revise ad and present fine cut	May 2014
State	Review and provide feedback on fine cut	May 2014
Contractor	Finalize ad and prepare YouTube file	May 2014
		\$130,043

Script Radio Ads

Prior to the scripting of radio ads, the Contractor shall collaborate with the State to determine how closely the radio ads should mirror the television ads, especially in terms of target audiences. There are two possible strategies the Contractor will work with the State to select the best scenario. The first strategy involves closely mimicking the television ad in order to fully reinforce our information and, alternatively, the second involves using radio as a cost effective opportunity to hone in on one or more specific demographics, such as young adults or small business owners. The Contractor, unless otherwise directed by the State Project Director shall develop a series of radio ads with at least one radio ad that mimics the television ads and others that target the following audiences:

- Young adults
- Small business owners
- Vermonters living in very rural areas
- Refugee population (may require non-English scripts)

The Contractor will use the strategic brief (and creative platform) to draft up to four radio scripts for the State Project Director’s review. The Contractor shall seek the insights of stakeholders – particularly those familiar with the target audiences some of the ads will be geared towards. Upon finalization of the language, the Contractor will repurpose sixty second scripts to thirty and fifteen seconds, to maximize the best availability and use of sound bites for local stations.

Contractor	Draft and present up to radio scripts	May 2013
State	Review and provide feedback on radio scripts	May 2013

Contractor	Revise radio scripts	May 2013
State	Review, share with stakeholders and provide feedback	May 2013
Contractor	Finalize up to four radio scripts	June 2013
		\$21,640

Produce Radio Ads

The final step in developing the radio ads will be the recording. Some ads may require narration by public figures or Vermonters telling their story, while others may be better served by voice-over talent. The Contractor will collaborate with the State Business Leaders to identify voice needs and share those options for review and approval. The Contractor will then manage the record of each radio ad and cut the best takes together, add music or other sound effects, and send broadcast-quality audio files for review.

Contractor	Identify and present voice-over options	June 2013
State	Approve voice-over talent	June 2013
Contractor	Record radio ads	June 2013
State	Review and provide feedback on radio ads	June 2013
Contractor	Finalize radio ads	June 2013
		\$33,986

Develop Print Ads

As with the television and radio ads, the process of developing print ads will stem from the strategic brief and creative platform. And, as with radio, print ads present an opportunity to hone in on specific target audiences via the diverse media outlets in the media plan. The Contractor shall work with State team leaders to determine if the print ad language will mirror the language in the television and radio ads and will evaluate the language as each ad is developed. The Contractor, unless otherwise directed by the State Project Director shall create ads that address the following needs and populations:

- General awareness
- General enrollment
- Young adults
- Small business owners
- Refugee communities

The Contractor will present concepts for each ad, each of which will include a leading visual, headline, body copy and call to action. All of these elements will be rooted in the research and language will be drawn from the television and radio ads as a means to reinforce communication through consistency. After consultation with the State team feedback, and the feedback of stakeholders, the Contractor will work with their in-house design team to provide the State with fully designed print ads. The Contractor shall also engage key stakeholders, identified by the State and gather their feedback.

To support the media buying team’s ad trafficking, the Contractor’s design team will prepare the files in the length-width ratios and formats preferred by the print outlets. The Contractor shall also allocate resources for modification of each print ad for use in subsequent years, if necessary (i.e. updating copy to reflect new open enrollment dates).

ALL	Identify print ad target audiences	Apr 2013
Contractor	Present print ad concepts	Apr 2013
State	Review and provide feedback on print ad concepts	May 2013
Contractor	Design "draft" print ads	May 2013
State	Review and provide feedback on print ads	May 2013
State	Share with stakeholders and funnel feedback	May 2013
Contractor	Revise and present print ads	June 2013
State	Approve print ads	June 2013
Contractor	Re-size print ads to media outlet specifications	ongoing
		\$84,224

Develop Online Ads

Online advertising is particularly effective at reaching specific groups within target audiences. Based on the strategic brief and creative platform and the media plan, the Contractor will develop 2 - 3 online ad concepts for the State's team review. These concepts will likely include one to three frames of visuals and text, all designed to attract attention and encourage Vermonters to visit the Vermont Health Connect website. The Contractor will then take the State's preferred concept or concepts, and program a banner ad for the State's review. The Contractor will program the ad in whichever formats are desired by the online outlets within the media buy.

The media plan will include the following types of online ads:

- Banner and mobile ads (of varying sizes) – static and HTML5 ([dp]see: <http://mashable.com/2010/09/24/html5-mobile-advertising/>)
- Search engine advertising copy – The Contractor recommend running 2-3 ads at a time with a variety of keywords associated
- Facebook ads – page like ads, page post ads, marketplace ads

Online advertising also has the benefit of immediate metrics and reporting. Within days, the Contractor will gauge an ad's effectiveness. And in most cases, the Contractor shall have the ability to swap out banner ad files or update search engine advertising text in a timely manner.

Contractor	Identify online ad needs (formats, sizes)	May 2013
Contractor	Present online ad concepts	May 2013
State	Review and provide feedback on online ad concepts	June 2013
Contractor	Program "draft" online ads	June 2013
State	Review and provide feedback on programmed ads	June 2013
Contractor	Finalize online ads	July 2013
		\$43,044

Develop and Produce Collateral Materials

The Contractor shall design collateral materials – whether they are in hard copy or available for viewing online – to maintain the critical touch point both for reaching target audiences and for supporting partners in their outreach. The Contractor shall also design administrative materials –

including Power Point templates, business cards and letterhead – that will support the functions of the State staff.

Identify Collateral Materials Needs

The State’s grassroots needs, combined with those of stakeholders, will be the driving force in determining the type of collateral materials that will be created. The following adaptable list of collateral materials will be selected in conjunction with stakeholders and the State. The Contractor shall align the following deliverable in conjunction with the State’s needs:

- Palm card
- Poster
- Brochure for individuals and families
- Brochure for small business owners
- Informational event flyer (that can be tailored per event)
- Enrollment event flyer (that can be tailored per event)
- Three direct-mail pieces (for current Medicaid/CHIP, Catamount and VHAP beneficiaries)
- Table tent
- Event signage (banners, quick screens, podium signage, table drapes, etc.)
- Power Point template
- Business cards and letterhead

The Contractor will work with the State to determine which of these or other pieces that the State would like to create – and in which languages – and to develop a print production schedule utilizing the State’s printing services that prioritizes the materials that needs to reach the field the earliest.

The Contractor will assist with reassessing these needs – internally and with stakeholders – following the first year of open enrollment. Knowing what worked, what didn’t, and if there were any gaps in resources will determine if new materials need to be created in 2014.

State	Share stakeholder recommendations	Apr 2013
Contractor	Present memo identifying materials and specs	Apr 2013
State	Approve list of materials	Apr 2013
		\$2,862

Develop Collateral Materials

The Contractor will draft and design all collateral materials to be used by Vermont Health Connect and partners in communication with consumers, small businesses, consumer assisters and others. As a first step in the materials development process, the Contractor will compile a core set of research-based language elements for use in print materials. This language will allow materials to consistently define Vermont Health Connect and the steps consumers and small businesses should take.

For core materials – such as a poster or brochure – the Contractor will present a concept that incorporates both visual and language elements for the State team review. In designing the materials, The Contractor will look to previous advertising (and previous research) for guidance on the look and feel of collateral materials, while also referring back to the Vermont Health Connect style guide to ensure that colors, fonts and logo use are consistent throughout. Because some materials will be tailored to meet the needs of specific audiences, and others will be limited in their design scope (i.e. a podium sign), The Contractor will assess the needs of each collateral material and determine when

additional language or design elements are needed. As materials are approaching their near-final stage, The Contractor shall engage partners who will be using the materials to ensure that they meet their needs and expectations.

With the State's approval the Contractor will purchase images and other assets necessary to finalize the files. The Contractor will also prepare files in two formats – PDFs that can be downloaded as-is, and as print-ready PDF files that can be provided to the State for printing.

The Contractor shall include translation and design of select set of 2-3 collateral materials in up to four non-English languages. (Additional languages are available but not included in this contract).

Contractor	Draft and present core language document	Apr 2013
State	Review and provide feedback on language	Apr 2013
Contractor	Finalize core language document	Apr 2013
Contractor	Present core materials concepts	May 2013
State	Review and provide feedback on concepts	May 2013
Contractor	Design and present core materials	June 2013
State	Review and provide feedback on core materials	June 2013
Contractor	Present revised core materials	June 2013
Contractor	Design and present additional materials	June 2013
State	Review and provide feedback on additional materials	July 2013
Contractor	Coordinate translation of materials	July 2013
Contractor	Finalize all materials	July 2013
		\$95,005

Update Collateral Materials

The Contractor will provide updates for the 2014 open enrollment period such as, changing the open enrollment dates – or other language or visual elements that may require updating to better communicate with Vermonters.

ALL	Asses existing materials	Apr 2014
State	Determine where updates are needed	Apr 2014
Contractor	Update materials	June 2014
Contractor	Finalize all materials	July 2014
		\$28,453

Assist in Securing Fulfillment House

The Contractor will work with the State to identify their fulfillment needs and will utilize the State procurement process to assess rates, quality and viability as a State sub-contractor. With the Contractor's assistance, the State will contract services directly with the fulfillment house to ensure that the contract can be maintained without interruption for years to come.

ALL	Identify fulfillment house needs	Apr 2013
Contractor	Identify fulfillment houses in Vermont and their rates	Apr 2013
Contractor	Assist in negotiation/contracting as needed	Apr 2013
		\$5,675

Work with State to Manage Printing

The Contractor shall work with the State printing facilities which has first right of refusal on all print orders. The Contractor will work through the State procurement process to determine quantities for an initial print run for each collateral material. In the event the State printing facilities are unable to fulfill the print order the Contractor will work with the DVHA Business Office to collect cost estimates utilizing the procurement process for publicly funded projects. In the event an outside vendor is required the Contractor shall management the order and any requirements for a fulfillment house for storage, the Contractor will work with the State team leads to set up a reporting mechanism through the fulfillment house and identify depletion points that should trigger reprinting of specific materials if outside fulfillment house is utilized.

Following the first open enrollment period, the Contractor shall reassessing printing needs with potentially new materials to take into consideration.

Contractor	Identify print quantity needs	Apr 2013
Contractor	Research vendors and secure quotes	May 2013
Contractor	Reassess printing needs	Apr 2014
		\$9,067

Additional Video Content

The Contractor shall produce videos, to be featured on the Vermont Health Connect informational website and subsequently on the transactional website that helps define and explain Vermont Health Connect to Vermonters. The video content will be shared through emails, Facebook, Twitter and more.

Video FAQs

Though the website will feature a frequently asked questions page with written answers to many of the questions Vermonters have, a series of recorded question and answer responses with Vermont Health Connect leadership will provide the opportunity to break down a complex issue – such as tax credits – in a visual way. The Contractor will provide 6 videos of Vermont Health Connect representatives or partners speaking to camera with supporting visual graphics. The Contractor will first script audio and visual elements and, with the State’s approval, shoot the video series in the course of a day. The videos, with approval of the State, will be released on a bi-weekly basis as new, engaging content to draw Vermonters to the website. The Contractor will also assist in uploading the videos to the Vermont Health Connect YouTube account and providing an embed code that can be shared with partners and other state agencies who wish to feature the video content on their websites.

Recorded Public Forum

To provide all Vermonters the opportunity to access current information, the Contractor shall film a small forum to minimize interruptions and control for sound. Following the record, the Contractor shall produce a video of the filming with an introductory “card” describing the event, and an “end card” with contact information. The Contractor will also assist in uploading the videos to the Vermont Health Connect YouTube as needed.

State	Identify public forum to record	Apr 2013
Contractor	Record forum	TBD
Contractor	Light edit and finalization of forum video	TBD
ALL	Identify up to 6 FAQ questions to record	Apr 2013

Contractor	Draft 6 FAQ scripts with visuals and language	Apr 2013
State	Review and provide feedback on FAQ scripts	Apr 2013
Contractor	Finalize scripts and schedule record	Apr 2013
ALL	Film up to 6 FAQ videos	Feb 2014
Contractor	Edit FAQ videos	Feb 2014
State	Review and provide feedback on FAQ videos	Feb 2014
Contractor	Finalize FAQ videos and provide YouTube files	Feb 2014
		\$79,670

Online Content

To facilitate online content that can be utilized to engage and educate Vermonters, connect partners and provide media with resources, the Contractor shall draft web-ready language for partners to feature on their website and encourage people to visit the Vermont Health Connect website. A web button that can be placed on websites of other state agencies and offices, partners, carriers and others will direct their visitors to the Vermont Health Connect website. The Contractor will create web buttons in a variety of sizes to fit the space available on websites willing to host the link.

Due to the popularity of infographics, that have increased drastically in recent years due to the way in which they can explain complex ideas or processes, the Contractor shall create three infographics detailing the enrollment process for individuals and families, how to access the small business tax credit, and uninsured and underinsured data to support this effort in the media and among community leaders.

Contractor	Design web buttons in varying sizes	Apr 2013
ALL	Identify three infographic topics	Apr 2013
Contractor	Draft copy and identify visual flow for infographics	Apr 2013
State	Review and provide feedback on infographics content	Apr 2013
Contractor	Sketch design of infographics	Apr 2013
State	Review and provide feedback on design sketches	Apr 2013
Contractor	Design infographics	Apr 2013
State	Review and provide feedback on design	Apr 2013
Contractor	Finalize infographics	May 2013
		\$38,511

Earned Media

Conduct Earned Media Landscape

The Contractor will provide an analysis of all of the reporting and media coverage on Vermont Health Connect to-date (through December 31, 2014), including coverage that occurred prior to its naming. The media landscape will include news pieces on television or radio, articles, op-eds, columns, major blog posts and editorials that can be identified through LexisNexis, Vocus, the internet, and news clips archives. The Contractor will research all of the reporting and media coverage; where possible, identify the tone of the piece; and will determine if and how inaccuracies and information gaps can be remedied in the analysis.

ALL	Identify landscape needs and goals	Apr 2013
Contractor	Conduct and present landscape report	Apr 2013

\$18,235

Determine Communications Waves Strategy

The Contractor will develop a communications waves strategy with the goal of promoting enrollment with Vermont Health Connect at certain times of the year when health issues are on the minds of Vermonters. The strategy will identify themes and moments throughout the year, as well as events that could be attended or created to complement those waves. The Contractor will consider tactics that can be easily replicated or adapted in towns across the state. The Contractor will focus outreach around the following themes that are spread throughout the upcoming year:

- Tax season – provide tax preparers and accountants with materials they can share with small business clients, plan a “tax consultation” event focusing on the small business credit
- Back-to-school time – partner with schools to send information home to parents, connect with health care providers administering sports checkups to share materials with patients
- Cold and flu season – partner with clinics administering flu shots, promote Vermont Health Connect in pharmacies

The Contractor will prioritize wave activities leading up to and during open enrollment.

Contractor	Present a communication waves strategy, including suggested events	Apr 2013
State	Review and provide feedback on waves strategy	Apr 2013
Contractor	Finalize communication waves strategy	Apr 2013
		\$8,910

Identify Earned Media Strategy

The Contractor will utilize their earned media strategy which will be determined in part by the media landscape, and in part by the goals set as a team. The media landscape will indicate what communications need to be highlighted and which areas of the state, or what populations need increased communications. The strategy will also be informed by the communication waves strategy to the degree that communication and events require earned media attention.

The Contractor will utilize the months leading up to open enrollment as an opportunity to educate media and inform them of the State’s progress on a regular basis. Leading up to open enrollment, The Contractor shall transition to an awareness building strategy with the end goal of informing Vermonters about Vermont Health Connect. During open enrollment, the Contractor will drive traffic to the website and to the Customer Support Center and community assisters to ensure that Vermonters know their options. Following the first open enrollment period, the Contractor will relay enrollment information to those eligible for Medicaid/CHIP and small businesses with non-January 1 plan years, while concurrently sharing the success of Vermont Health Connect’s launch. The Contractor will discuss these strategies with the State team to determine which are best suited to ultimately reach the goals of raising awareness and driving enrollment.

The Contractor will assist the State Project Director and team to develop the core earned media team to be identified early on with representatives from Vermont Health Connect (including at least one primary spokesperson), the Department of Financial Regulation and the Governor’s office. This team will reassess the earned media strategy on a quarterly basis to ensure that it aligns with other communication efforts and is reflective of the environment.

The Contractor will also organize a meeting with the Medicaid and Exchange Advisory Board co-chairs to gauge their comfort level with on-the-record interviews. Media may be interested in speaking with them on a regular basis and understanding their comfort level will determine elements of how the Contractor will employ earned media tactics.

Contractor	Draft and present earned media strategy	Apr 2013
State	Review and provide feedback on earned media strategy	Apr 2013
Contractor	Finalize earned media strategy	Apr 2013
State	Identify spokespeople	Apr 2013
State	Connect with MEAB spokespeople	Apr 2013
		\$15,345

Create Media List

The Contractor will create a comprehensive media list of news outlets in the state that Vermonters most rely upon. The Contractor shall assist in building a list of reporters covering health care, policy, politics and lifestyle issues. This will enable a tailored approach to outreach depending on the topic. Utilizing media contact services and the Contractor’s own research, the media list will identify:

- Reporter Name
- Outlet
- Beat/responsibility
- Email
- Phone

State	Identify media list component needs	Apr 2013
Contractor	Develop media list	Apr 2013
State	Review and identify additional needs	Apr 2013
Contractor	“Finalize” media list	Apr 2013
Contractor	Update media list	ongoing
		\$8,600

Identify & Schedule Editorial Board Meetings

The Contractor will develop a list of editorial board meeting targets, identifying the most influential editorial boards in the state and the publications Vermonters most rely on. Once the State has agreed on the list of editorial boards to target, the Contractor will work with the communications staff at Vermont Health Connect to reach out to the editorial boards to schedule meetings. For that outreach, the Contractor will draft a letter/memo detailing the purpose of the meeting and the request.

Contractor	Identify editorial board targets	Apr 2013
State	Approve editorial board targets	Apr 2013
Contractor	Develop outreach strategy and materials	Apr 2013
State	Review and provide feedback on strategy and materials	Apr 2013
Contractor	Schedule editorial board meetings (for summer mtgs)	Apr 2013
		\$12,600

Develop Editorial Board Meeting Materials

Editorial board meetings require a fair amount of preparation and materials development. The Contractor will assist in preparation of the Vermont Health Connect leadership/spokespeople and provide the editorial boards with all of the resources they might need to answer questions, provide accurate context and encourage coverage.

In advance of the meetings, the Contractor will prepare briefing materials detailing recent media coverage by each newspaper, reporter or editorial staff backgrounds where possible and likely questions to come from their board. In preparation of these meetings, the Contractor will prepare the following materials:

- Fact sheet with uninsured and underinsured data
- Relevant research reports
- Easy-to-read overview
- Timeline
- Supporting statements from partners, carriers and other state entities
- If possible, a detailed notes for a walk-through of the transactional website

ALL	Agree upon editorial board meeting material needs	Apr 2013
Contractor	Develop editorial board meeting materials	May 2013
State	Review and request additional information as needed	June 2013
		\$18,045

Develop & Maintain an Editorial Calendar

The Contractor will develop an editorial board calendar that will outline opportunities to tie into existing themes, stories and events that outlets are already covering, as well as the communication waves. The calendar will be organized chronologically and by themes and events (such as health fairs, town meeting day, public forums, etc.) that can be leveraged to generate news coverage. The calendar will identify stories that can be tied to the themes and events, if there is a geographic focus (i.e. an event in Bennington may not be relevant to media in St. Johnsbury), and action steps and assignments for earned media outreach. It will also include an op-ed placement calendar, identifying the deadlines and the qualifications required for op-ed placement in publications across Vermont.

Contractor	Recommend editorial calendar structure and components	Apr 2013
State	Approve calendar structure/components	Apr 2013
Contractor	Develop initial calendar	Apr 2013
State	Review and provide feedback on initial calendar	Apr 2013
Contractor	“Finalize” initial calendar	Apr 2013
Contractor	Maintain calendar	ongoing
		\$31,365

Develop Spokesperson Training Materials

The Contractor will develop training materials designed for a core set of spokespeople who can speak knowledgeably about Vermont Health Connect with reporters and bloggers at a moment’s notice. Spokesperson training materials will include a guide on best practices when talking to reporters, a set key talking points and instructions on what tips on what not to do when communicating with media.

Contractor	Develop spokesperson training materials	Apr 2013
State	Review and request additional information if needed	Apr 2013
Contractor	Finalize spokesperson training materials	Apr 2013
		\$11,637

Provide a Recommended Spokesperson Training Schedule

Spokespeople will need to be trained well in advance of launch. The Contractor will recommend a primary training schedule so that spokespersons are available throughout 2013 and the Contractor will recommend a “refresher” for spokespersons (some of which may be new) immediately before the launch – ensuring that the latest facts, figures and information are top of mind.

State	Identify spokespersons (see earned media strategy)	Feb 2013
Contractor	Develop training schedule that aligns with strategy	Feb 2013
		\$5,314

Build a Story Bank

The Contractor will develop a resource of relatable stories from real Vermonters which will not only serve as a way to encourage consumers to explore the website – it will be a hook for media. The Contractor will work with the State to build a story bank of reliable stories and spokespersons who can attest to the positive change or experience as a result of health reform and Vermont Health Connect.

Work with State to contact/identify individuals willing to share their story

The Contractor shall seek out stories with by and large undisputable facts. The Contractor will work closely with the State to identify individuals who are willing to tell their health coverage success story with Vermont Health Connect publicly. The Contractor will work to highlight this opportunity on the Vermont Health Connect website as a means for these individuals to contact the team with their story. The Contractor will work with Community partners, particularly those already conducting enrollment assistance. The Contractor will speak to each individual, identified by the Community partners to narrate their story, and the Contractor will capture it in written form for reference in a story bank and to be used at the State’s discretion.

The Contractor will develop a release form to ensure that the individuals sharing their story are aware that their story will likely be shared publicly and give permission for Vermont Health Connect to do so. At launch, the story bank will be small, but The Contractor will continue to engage Vermonters through the website and, post-launch, through consumer assisters and encourage individuals to share their stories. This deliverable will be an ongoing project to maintain a fresh and relevant story bank through open enrollment and leading up to subsequent enrollment periods.

Prep individuals sharing their story

After gauging an individual’s willingness to share their story, the Contractor will prepare them for going public. Ultimately, the Contractor work with the individual(s) to ensure the story to be genuine. The Contractor will utilize various preparations strategies (depending on how the medium), the Contractor will conduct most preparation over the phone, at the individual’s convenience, and share speaking tips and tricks to put them at ease.

ALL	Identify story types	Apr 2013
Contractor	Develop outreach strategy	May 2013

State	Review and provide feedback on outreach strategy	May 2013
Contractor	Conduct outreach	Ongoing 2013
Contractor	Develop "prep" for those sharing their story	July 2013
State	Review and provide feedback on prep materials	Aug 2013
Contractor	Follow up with individuals for prep	Ongoing 2013
		\$37,267

Create a Video Story Bank

For a select collection of stories, the Contractor will film and edit six short testimonials. These videos can be used on the Vermont Health Connect website, shared on social networks, and even pitched to online media outlets. The Contractor will work to select the filming of these testimonials in locations where the story tellers will be most comfortable – in their homes, at their business or even outdoors. The Contractor will draft scripts that align with the story they’ve shared but allow them to tell it in their own words on camera (all the while ensuring that their story remains accurate and remains on point). The Contractor will edit the videos to feature the story tellers name and city and finalize the files pending the State’s review. The Contractor can also assist in uploading the videos to the Vermont Health Connect YouTube account and providing an embed code that can be shared with partners and other state agencies who wish to feature the video content on their websites. The State Outreach and Education will work with State internal resources to ensure all social media are in compliance with State processes and regulations.

Contractor	Identify stories from story bank	Oct 2013
State	Review and approve individuals	Oct 2013
Contractor	Draft video scripts	Oct 2013
State	Review and provide feedback on scripts	Nov 2013
Contractor	Finalize scripts	Nov 2013
Contractor	Film stories	Nov 2013
Contractor	Edit and present	Dec 2013
State	Review and provide feedback on videos	Dec 2013
Contractor	Finalize videos and provide YouTube files	Jan 2014
		\$76,942

Draft Media Materials

The Contractor shall identify the amount of materials the State has allocated resources for. This will guarantee that materials can be created at any point throughout the year – not just at pre-determined milestones. The Contractor will be prepared to draft the following materials, as needed (and including the Exchange launch press event):

- Press releases (10)
- Media advisories (10)
- Talking points (5)
- Frequently asked questions (2 updates)
- Template op-ed (3)

The Contractor will draft three boilerplate op-eds that can be used by policymakers, advocates, consumers and influencers across the state. The Contractor will include relevant stakeholders – those who might use the template – in the review process to ensure their comfort with the tone and language. In each op-ed, the Contractor will identify locations for tailoring.

The Contractor shall provide the deliverables as listed above prior to January 2014.

\$56,565

Organize Exchange Launch Press Event

The Contractor will assist the State in planning a multi-faceted press launch of Vermont Health Connect. Though the primary focus of the press event will be to engage media, the Contractor will utilize this opportunity to engage key stakeholders and involve them in the outreach and education from early in the process.

The Contractor, with approval of the State will host this event in close proximity to October 1, 2013; to ensure that Vermonters, in reaction to the news coverage, can immediately go to the website and enroll. Additionally, the earned media strategy will engage media in other ways leading up to the launch so that information about Vermont Health Connect is still being communicated.

The Contractor will scout locations throughout the state that are accessible to the media and could meet the technical needs required of an event of this nature. The Contractor will present location options and secure a location that meet event needs.

The Contractor will work closely with the State to identify two or three co-sponsors and the event will feature Exchange leadership, State leadership, a call center employee who can speak to the assistance that will be available, and Vermonters who stand to benefit from the availability of Vermont Health Connect.

Contractor	Present launch press event strategy	May 2013
State	Review and provide feedback on strategy	June 2013
Contractor	Finalize press event strategy	June 2013
Contractor	Secure location, date, time, co-sponsors speakers	July 2013
Contractor	Develop press event materials	Aug 2013
State	Review and provide feedback on materials	Sept 2013
Contractor	Finalize materials	Sept 2013
Contractor	Develop day-of run-of-show	Sept 2013
Contractor	Coordinate pre-launch run-through	Sept 2013
Contractor	Manage day-of event	Oct 2013
		\$79,725

Develop Exchange Launch Communication Plan

On a parallel track to the event planning, the Contractor will develop a communication plan surrounding the launch event to ensure that the State team has a sense of all the moving pieces (concurrent social media push, materials distribution, etc.). The plan will also identify ways in which partner organizations, consumer assisters and others can be a part of the launch and ongoing outreach and education.

Contractor	Develop launch communication plan	July 2013
State	Review and provide feedback on communication plan	Aug 2013
Contractor	Finalize communication plan	Aug 2013
		\$16,425

Pitch Exchange Launch Press Event

Leading up to launch, the Contractor will create a “pitch list” of media to target for outreach. Though all individuals on the media list will receive the press release and related media materials, identifying a priority pitch list will help focus efforts on outlets that reach identified target audiences. This list will include newspaper, television and radio outlets as well as bloggers. The Contractor will tailor the pitch to provide the outlets on the pitch list with the resources they need to share the story – be it a radio interview, graphics to insert in a blog or an on-air walk-through of the Vermont Health Connect website.

The Contractor will also prepare support materials for Vermont Health Connect leadership and partners to prepare everyone for their media engagements. This might include talking points, frequently asked questions and/or briefing notes on the media outlet or reporter.

Contractor	Identify pitch list and coverage “wish list”	July 2013
Contractor	Identify pitch material needs	July 2013
State	Review and approve pitch material needs	Aug 2013
Contractor	Develop pitch materials	Aug 2013
State	Review and provide feedback on pitch materials	Sept 2013
Contractor	Finalize materials	Sept 2013
		\$31,797

Work with Public Access Stations to Schedule Vermont Health Connect Series

The Contractor will create a list of public access stations throughout the state and develop a menu of “offerings” that can help communicate information about Vermont Health Connect. These opportunities could be one-on-one interviews with Vermont Health Connect leadership, recordings of public forums, or dial-in program to answer questions from the community that give stations flexibility to be a part of the series in a way that works for them. The Contractor will develop materials to support Vermont Health Connect staff participating in the series, including frequently asked questions, a presentation or visuals to support the event.

Contractor	Compile list of all public access stations and contact info	Apr 2013
Contractor	Develop and present menu of offerings	Apr 2013
State	Review and provide feedback on menu of offerings	Apr 2013
Contractor	Develop materials to support outreach and offerings	May 2013
Contractor	Contact stations to coordinate series	June 2013
State	Participate in series	Sept – Dec 2013
		\$23,822

Paid Media

The Contractor will coordinate the media buys and work with the State to design a media plan that uses television, radio, print and online to amplify, extend and reinforce Vermont Health Connect’s communications to Vermonters.

Confirm Target Audiences and Identify Geographic Targets

The Contractor will review the media plan and confirm target audiences. The Contractor in conjunction with the State’s team members will determine the segmented demographics. The Contractor shall use best practices in designing the media plan. The Contractor will not only identify where target audiences are within the state of Vermont, but also investigate how efficient channels such as television, radio and newspapers would be in those areas. The Contractor will produce a short memo detailing the audiences and geographic targets hoped to reach through paid media for the State’s review.

ALL	Review outreach and education plan target audiences	Dec 2013
Contractor	Draft and present memo identifying audiences/geography	Dec 2013
State	Review and provide feedback on memo	Jan 2014
Contractor	Finalize target audiences/geography	Jan 2014
		\$15,367

Traffic Advertising

The Contractor shall work with stations to determine their preferred formats – whether it’s high-definition or regular television, the length-width and file type of an online ad, the specifications of an audio file, or the color capabilities and size of print ads and timing of ads. The Contractor will deliver the ads to stations as quickly as they will allow.

Contractor	Determine media specs	Apr 2013
Contractor	Traffic advertising work orders	Throughout Contract Term
		\$20,767

Social Media

The Contractor shall develop a social media presence for Vermont Health Connect will help facilitate an ongoing conversation where people can ask questions, share their stories and experiences, pass information on to others, and drive traffic to Vermont Health Connect when it’s open for business. The State will work with internal resources to ensure all social media are in compliance with State processes and regulations.

Secure and Design Social Media Channels

The Contractor has already secured the following online profiles for Vermont Health Connect:

- Twitter
- Facebook
- YouTube
- Google+

The remaining profile that the Contractor can secure is on LinkedIn. As a next step, the Contractor shall work with the State to develop the Vermont Health Connect look-and-feel to each profile. Utilizing its existing knowledge of the limitations of each social media property, the Contractor will develop creative assets that tie all profiles together.

Contractor	Secure LinkedIn profile	Apr 2013
Contractor	Update social media channels tracker	Apr 2013
Contractor	Identify social media channels design needs and opportunities	Apr 2013
State	Review and approve design needs	Apr 2013
Contractor	Design backgrounds, avatars, etc.	Apr 2013
State	Review and approve designs	Apr 2013
Contractor	Implement design files on social media channels	Apr 2013
		\$9,108

Develop Basic Content

The Contractor will populate necessary profile features to reflect the Vermont Health Connect brand and communications for each social media outlet. The Contractor will tailor images and content for each platform.

Contractor	Identify basic content needs	Apr 2013
State	Review and approve basic content needs	Apr 2013
Contractor	Draft content and identify visuals	Apr 2013
State	Review and provide feedback on content/visuals	Apr 2013
Contractor	Finalize content/visuals	Apr 2013
		\$4,482

Develop Engagement Strategy

As part of the engagement strategy, the Contractor will also develop guidelines for online engagement that staff can reference when making decisions about how and when to engage, what type of information can be provided, when to direct people to the call center or Consumer Assistants and more. The recommendations will focus on what social media platforms are best suited for the intended target audiences as well as the available staff time and resources. The Contractor will also create a quarterly editorial calendar that can guide tweets, posts and digital content to ensure a steady stream of facts, figures and visuals that are easily understood and interesting to users and their networks. The calendar will factor in key milestones of implementation as well as outside events and media opportunities that can be amplified through social media channels.

The plan will also provide the how-to's on other ideas for engagement including hosting events like Twitter chats where followers can ask questions to a featured speaker or asking Facebook fans to participate in a poll on how much they know about Vermont Health Connect.

The Contractor will develop a set of sample posts and tweets to direct users to the tools and resources available on the Vermont Health Connect website where they can search and compare health plans. The Contractor will also provide sample posts and tweets that can encourage Vermonters to share their inspiring stories of getting coverage, benefitting from financial assistance, or easily navigating the website – all to contribute to the story bank.

The State will provide the resources to maintain monitor and update content on social media sites as needed.

ALL	Identify social media goals	Apr 2013
Contractor	Draft social media engagement strategy	Apr 2013
State	Review and provide feedback on strategy	Apr 2013
State	Identify social media monitor on staff	Apr 2013
Contractor	Finalize social media engagement strategy	Apr 2013
Contractor	Develop materials to facilitate engagement	Apr 2013
State	Review and provide feedback on materials	Apr 2013
Contractor	Finalize materials	Apr 2013
		\$20,025

Develop Monitoring Strategy

The Contractor will provide guidance on how to measure key metrics on audiences and activity and referrals from social media sites to the Vermont Health Connect website. Facebook allows accounts access to its analytic tool, “Facebook insights,” to learn more about how audiences are engaging with content. Also, tools such as Topsy (compare mentions and retweets), Twitter Counter (compare followers, followings and tweet volumes), TweepMap (identify where followers are from) and others can be used to capture metrics on Twitter. Based on the metrics the State chooses to track, the Contractor will develop a strategy that details the tools needed to capture that information and the process by which it can be gathered.

ALL	Identify social media tracking needs (that align with social media goals)	Feb 2013
Contractor	Identify free or low-cost services that meet tracking needs	Apr 2013
State	Select services for use	Apr 2013
Contractor	Develop strategy for monitoring through each service	Apr 2013
State	Review and provide feedback on strategy	Apr 2013
Contractor	Finalize strategy	Apr 2013
		\$11,160

Consumer Assistance Program

Finalize Consumer Assisters Training Curriculum

The Contractor will draft and finalize remaining components of the training curriculum for certified Consumer Assisters working in Vermont. The Contractor shall draft elements of the curriculum where information is currently available.

- Train-the-Trainer

- Overview of the Program
- Trainer Essentials
- Facilitation Guide
- Demonstrations
- Post Course Evaluation
- Consumer Assister Training
 - Eligibility and enrollment rules and procedures (phase 2)
 - Range of QHP options (phase 2)
 - The website Navigation (phase 2)
 - Sources of Information and Referral
 - Scenarios
 - Post Course Evaluation

ALL	Confirm remaining curriculum needs and components	Apr 2013
Contractor	Draft phase 1 of remaining curriculum	Apr 2013
State	Review and provide feedback on phase 1 of remaining curriculum	Apr 2013
Contractor	Revise phase 1 of remaining curriculum	Apr 2013
State	Review and approve phase 1 of remaining curriculum	Apr 2013
Contractor	Draft phase 2 of remaining curriculum	July 2013
State	Review and provide feedback on phase 2 of remaining curriculum	July 2013
Contractor	Revise phase 2 of remaining curriculum	July 2013
State	Review and approve phase 1 of remaining curriculum	July 2013
Contractor	Finalize full curriculum	July 2013
		\$36,787

Consult on a Framework for Complaints and Decertification

The Contractor will share initial thoughts for handling complaints with regards to the Consumer Assistance Program as well as determinations for decertification. The Contractor will be available to support the State as a process for addressing complaints and decertification is defined.

State	Schedule meeting to discuss complaints/decertification	Apr 2013
Contractor	Provide recommendations	Apr 2013
Contractor	Review framework as it is developed	Apr 2013
		\$9,450

Develop Metrics for Assessing Progress and Contract/Grant Fulfillment

The Contractor will work closely with the State to develop metrics to assess the progress and fulfillment of grantees participating in the Consumer Assistance Program. These metrics will be drawn from the Consumer Assisters evaluation plan and will measure success (likely through number of enrollees, satisfaction of services, etc.) in a series of activities and consideration of bonus payments.

State	Identify staff available for assessing contract fulfillment	Apr 2013
Contractor	Draft and present metrics	Apr 2013

State	Review and provide feedback on metrics	Apr 2013
Contractor	Revise metrics	Apr 2013
State	Review and provide feedback on revised metrics	Apr 2013
Contractor	Finalize metrics	Apr 2013
		\$20,475

Develop a Process for Evaluating RFPs

Evaluating Navigator and In-Person Assister applications will require a process that aligns with the staffing available to supports evaluation needs and identifies a system for reviewing applications in a fair and equitable manner. The Contractor will assist in creating a scoring card that addresses each of the certification criterions and identifies a weighting system, if necessary. This will ensure that the selections are supported by the criteria.

State	Identify staff available for RFP evaluation process	Apr 2013
Contractor	Draft and present evaluation process	Apr 2013
State	Review and provide feedback on evaluation process	Apr 2013
Contractor	Revise evaluation process	Apr 2013
State	Review and provide feedback on revised evaluation process	Apr 2013
Contractor	Finalize evaluation process	Apr 2013
		\$18,720

Additional Projects

Project Management

Following weekly calls between the Contractor and State, the Contractor will provide call notes and make note of upcoming tasks and deadlines. The Contractor will also manage the deliverable schedule and update it on a regular basis in consultation with the State.

Contractor	Host weekly calls, follow up with call notes and manage deliverable schedule	Ongoing 2013
Contractor	Host weekly calls, follow up with call notes and manage deliverable schedule	Ongoing 2014
		\$23,175

Ad Hoc Tasks

Additional tasks outside of the scope of work detailed above may be requested of GMMB and paid for out of an "ad hoc tasks" budget. All additional work will be reimbursed at a single, blended rate of \$214 per hour.

Contractor	800 hours of additional work	Throughout Contract Term
		\$171,200

4. By deleting Attachment B page 8 of 25 of the base agreement, and substituting in lieu thereof the following Attachment B:

**ATTACHMENT B
PAYMENT PROVISIONS**

The maximum dollar amount payable under this agreement is not intended as any form of a guaranteed amount. The Contractor will be paid for services specified in Attachment A, for services actually performed, up to the maximum allowable amount specified in this agreement. State of Vermont payment terms are Net 30 days from date of invoice, payments against this contract will comply with the State's payment terms. The payment schedule for delivered products, or rates for services performed, and any additional reimbursements, are included in this attachment. The following provisions specifying payments are:

1. Payment Schedule: Payment shall be issued to the Contractor on as a fixed cost with the submission and acceptance by the State of each deliverable. Contractor will not be reimbursed for other expenses, including travel, supplies, benefits or insurance. Contractor shall invoice upon acceptance by the State of each final deliverable listed within the Deliverable Schedule contained in this attachment.
2. Failure to meet a deliverable date shall result in a 10% deduction from the amount allowed to the contractor for that deliverable.
3. Invoices shall be submitted on the Contractor's official letterhead, signed by an authorized representative of the Contractors organization, reference this contract's number and be submitted to:

Emily Trantum
Business Office, Contracting Unit
Department of Vermont Health Access
312 Hurricane Lane
Williston, VT 054953

4. Total maximum payable under this contract shall not exceed \$1,812,588.

Deliverable	Estimate
Creative Platform	\$9,391
Scripted Television Ads and Storyboards	\$71,055
Storyboard Tests	\$120,079
Produce Television Ads	\$226,573
2014 Television Ad Script and Production	\$130,043
Radio Ad Scripts	\$21,640
Radio Ads Production	\$33,986
Print Ads	\$84,224
Online Ads	\$43,044
Collateral Material Needs Identified	\$2,862
Collateral Materials	\$95,005

Updated Collateral Materials	\$28,453
Fulfillment House Secured	\$5,675
Printing Assistance and Expertise Provided	\$9,067
Additional Video Content	\$79,670
Online Content	\$38,511
Materials Development Sub-Total	\$999,278

Earned Media Landscape	\$18,235
Communications Waves Strategy	\$8,910
Earned Media Strategy	\$15,345
Media List	\$8,600
Editorial Board Meetings	\$12,600
Editorial Board Meeting Materials	\$18,045
Editorial Calendar	\$31,365
Spokesperson Training Materials	\$11,637
Recommended Spokesperson Training Schedule	\$5,314
Story Bank	\$37,267
Video Story Bank	\$76,942
Media Materials	\$56,565
Exchange Launch Press Event Organization	\$79,725
Exchange Launch Communication Plan	\$16,425
Exchange Launch Press Event	\$31,797
Vermont Health Connect Series Scheduled on Public Access	\$23,822
Earned Media Sub-Total	\$452,594

Target Audiences and Geographic Targets Identified	\$15,367
Traffic Advertising	\$20,767
Paid Media Sub-Total	\$36,134

Social Media Channels Account Set Up and Design	\$9,108
Basic Content for Social Media Channels	\$4,482
Engagement Strategy for Social Media Channels	\$20,025
Monitoring Strategy for Social Media Channels	\$11,160
Social Media Sub-Total	\$44,775

Consumer Assistants Training Curriculum	\$36,787
Framework for Complaints and Decertification	\$9,450
Metrics for Assessing Progress and Contract/Grant Fulfillment	\$20,475
Process for Evaluating RFPs	\$18,720
Consumer Assistance Program Sub-Total	\$85,432

Project Management	\$23,175
Ad Hoc Tasks	\$171,200

Additional Tasks Sub-Total	\$194,375
Total Budget Estimate	\$1,812,588

5. By deleting Attachment D page 14 of 23 of the base agreement, and substituting in lieu thereof the following Attachment D:

ATTACHMENT D

**MODIFICATION OF CUSTOMARY PROVISIONS
OF
ATTACHMENT C, ATTACHMENT E, or ATTACHMENT F**

1. **The insurance requirements contained in Attachment C, Section 7 are hereby modified:**

N/A

2. **Requirements of other Sections in Attachment C are hereby modified:**

Delete section 15. Sub-Agreements in its entirety and replace with the following:

Party shall not assign, subcontract or subgrant the performance of his Agreement or any portion thereof to any other Party without the prior written approval of the State which shall not be unreasonably withheld. Party also agrees to include in subcontract or subgrant agreements a tax certification in accordance with paragraph 13 above.

3. **Requirements of Sections in Attachment E are hereby modified:**

Delete section 15. Penalties and Training in its entirety and replace with the following:

Business Associate understands that: (a) there may be civil or criminal penalties for misuse or misappropriation of PHI and (b) violations of this Agreement may result in notification by Covered Entity to law enforcement officials and regulatory, accreditation, and licensure organizations. If requested by Covered Entity, Business Associate shall participate in reasonable training regarding the use, confidentiality, and security of PHI.

4. **Reasons for Modifications:**

Attachment C Sections 15: The Contractor has requested assurance that the State will not deny the award of any subcontracts without good faith reasoning.

Attachment E Section 15: The Contractor is willing to participate in trainings that align with the included scope of work.

Approval:

Assistant Attorney General: _____

E-SIGNED by Seth Steinzor
on 2013-Apr-05

Date: _____

**STATE OF VERMONT
AMENDMENT TO PERSONAL SERVICES CONTRACT
GMMB, INC.**

**PAGE 26 OF 26
CONTRACT# 21446
AMENDMENT# 2**

State of Vermont – Attachment D
Revised AHS – 12-08-09

This amendment consists of 26 pages. Except as modified by this amendment and any previous amendments, all provisions of this contract, (#21446) dated February 10, 2012 shall remain unchanged and in full force and effect.

**STATE OF VERMONT
DEPARTMENT OF VERMONT HEALTH ACCESS**

**CONTRACTOR
GMMB, INC.**

 E-SIGNED by Mark Larson
on 2013-Apr-10

MARK LARSON, COMMISSIONER

DATE

 E-SIGNED by David Smith
on 2013-Apr-10

DAVID SMITH, PARTNER

DATE