DVHA Routing Form

Revision Date 5/1/12

Type of Agreement: **Contract** Agreement #: **21446** Form of Agreement: **Amendment** Amendment #: **3**

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: **Increase the maximum amount and revise Attachment A and Attachment B**

Start Date: **February 10, 2012** End Date: **July 31, 2014** Maximum Amount: **$2,852,288.00**

Amendments Only: Maximum Prior Amount: **$1,812,588.00** Percentage of Change: **57.40%**

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

Funding Source

ACA Exchange 93.525	**$2,852,288.00**		

Contents of Attached Packet

☒ AA-14
☐ Sole Source Memo
☒ Qualitative/Justification Memo
☒ Attachments A, B, C & F
☒ Attachment D - Modifications to C & F
☐ Attachment E - Business Associate Agreement
☐ Attachment G - Academic Research
☐ MOU
☒ Other: **Base, Amendment 1 & 2**

Reviewer		Reviewer Initials	Date In	Date Out
DVHA Grant & Contract Administrator				
DVHA BO	**Jill Gould**	J.G.		
DVHA Commissioner or Designee	**Mark Larson, Commissioner**	L.T.		
AHS Attorney General	**Seth Steinzor, AAG**	S.S.		
Following Approvals for Contracts Only:				
AHS CIO	**Darin Prail**	D.P.		
AHS Central Office	**Diane Nealy**	D.N.		
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 #:** 3

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:** 8/30/2013

Summary of agreement or amendment: Increase the maximum amount and revise Attachment A and Attachment B

II. FINANCIAL INFORMATION

Maximum Payable: $2,852,288.00 Prior Maximum: $ 1,812,588.00 Prior Contract # (If Renewal):

Current Amendment: $1,039,700.00 Cumulative amendments: $ 2,182,588.00 % Cumulative Change: 57.40 %

Business Unit(s): 3410; ; - [notes:] **VISION Account(s): 507600;**

II. 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. D.N. E.B.

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)
	E-SIGNED by Lindsey Tucker on 2013-08-28 19:33:53 GMT		E-SIGNED by Dixie Henry on 2013-08-29 14:34:37 GMT
Date	Approval by Attorney General	Date	Approved by Commissioner of Human Resources
	E-SIGNED by Seth Steinzor on 2013-08-28 20:02:10 GMT		

Date	CIO	Date	CMO	Date	Secretary of Administration
			N.D.		E-SIGNED by Michael Clasen on 2013-08-29 20:34:38 GMT

VERMONT

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

Agency of Human Services
[Phone] 802-879-5900
[Fax] 802-879-5651

MEMORANDUM

TO: Jeb Spaulding, Secretary of Administration M.C.
FROM: Mark Larson, Commissioner, Department of Vermont Health Access (DVHA) L.T.
DATE: Thursday, August 15, 2013
RE: GMMB, Inc Contract #21446, Amendment 3

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 this contract and prior amendments to ensure comprehensive strategic oversight and management of our outreach and education campaign throughout Vermont Health Connect's critical launch and open enrollment period.

GMMB is uniquely positioned in at least three ways to support Vermont Health Connect outreach and education effort. First, the outreach and education deliverables in Vermont Health Connect'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 Vermont Health Connect 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.

This amendment will slightly expand the scope of work and increase the maximum amount. The second amendment to this contract inadvertently deleted the payment provisions for the work in the base contract, and this amendment adds them back into the total contract cost.

Vermont Health Connect is preparing to touch a quarter million Vermonters starting in October 2013. In order to succeed in this ambitious goal, DVHA must manage a far-reaching outreach and education campaign. In addition, DVHA must evaluate its success throughout the campaign and make necessary adjustments to reach key populations of Vermonters before the end of open enrollment in March 2013. While the original GMMB contract and amendments are enabling DVHA to develop an extensive set of educational materials, a consumer assistance program, and media campaign, Amendment 3 provides the analytical tools, such as several phone surveys, to ensure that this campaign is deployed as effectively as possible. This oversight will help ensure that, late in the campaign, resources are efficiently targeted to reach those populations of Vermonters least likely to be aware of prior outreach efforts.

VERMONT

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Agency of Human Services

DVHA faces 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 3 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.

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 Marketplace (HBM), effective February 10, 2012, is hereby amended effective August 30, 2013, as follows:

1. By deleting Section 3 (Maximum Amount) on page 1 of 23, of Amendment 2, 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 $2,852,288.

2. By adding to Attachment A (Specification of Work to be Performed) on page 3 of 23, of the base contract, and adding the following Section:

Phone Surveys
The Contractor shall conduct two 8-minute, random digit dial telephone surveys of 1,000 adults ages 18-64 each in Vermont statewide. The first shall be conducted in September 2013 and the second will be conducted in early 2014. The surveys shall include 30% sample by cell phone. These surveys are brief and shall focus on measuring Vermont Health Connect awareness and recall. There shall be a sample size of 1,000 people in order to provide a robust reach with the most accurate and definitive results. The high cell phone sample shall be utilized in order to reach younger and lower-income households, who are more likely to be cell phone only. The cost of first tracking survey is $36,000, second survey is $29,500, and combined analysis is $4,500. The fees include the development of the questionnaires, purchasing the samples, programming the surveys, interviewing, cell phone calling, data tabulation, analysis, and report writing.

3. By deleting Deliverable Table in Attachment B (Payment Provisions) on page 23 of 26, of Amendment 2, and adding the following Deliverable Table:

Deliverable	Amount
Initial Review	$4,900.00
Stakeholder outreach	$12,500.00
Report on initial stakeholder input and research to date	$8,000.00
Certification criteria	$13,400.00
Certification process	$10,500.00
Training program	$19,000.00
Evaluation plan	$7,500.00
RFP and model contract	$6,500.00

Agendas, materials and minutes for 10 Joint Advisory Group meetings	$29,000.00
Agenda, materials and minutes for 6 regional public forums	$16,000.00
Agenda, materials and minutes for 6 business meetings	$16,000.00
Synthesis of public input into recommendations for Exchange design	$13,400.00
Stakeholder outreach	$15,900.00
Benchmark research phone survey results	$70,000.00
Brand assessment	$4,500.00
Name, logo, brand positioning and materials for testing	$110,000.00
8 focus groups to test brand	$112,000.00
Mission & vision statements	$8,000.00
Analysis report - outreach and education campaign	$31,000.00
Outreach & education plan	$47,500.00
Stakeholder training program	$28,500.00
Ad Hoc Tasks ($214/hr blended rate up to 400 hrs)	$85,600.00
Part I Sub-Total	**$669,700.00**
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 Assisters 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**
Phone Survey 1	$36,000
Phone Survey 2	$29,500
Analysis Report for Phone Survey 1 & 2	$4,500
Phone Survey Sub-Total	**70,000**
Project Management	$23,175
Ad Hoc Tasks	$471,200
Additional Tasks Sub-Total	**$494,375**
Part II Sub-Total Budget	**$2,112,588**
Total Budget	**$2,852,288**

This amendment consists of 4 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

E-SIGNED by Lindsey Tucker
on 2013-08-29 14:28:05 GMT

MARK LARSON, COMMISSIONER DATE

CONTRACTOR

GMMB, INC.

E-SIGNED by David Smith
on 2013-08-29 14:26:11 GMT

DAVID SMITH, PARTNER DATE