



**MNsure**<sup>®</sup>

Where you choose health coverage

**MNsure Request for Proposals  
Fiscal Year 2017 Outreach and Education  
Grants**



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## Introduction

MNSure is a marketplace where individuals, families and small businesses can compare, choose and enroll in affordable, high quality health insurance. The mission of MNSure is to ensure all Minnesotans have access to quality, affordable health insurance. Despite this new, streamlined enrollment process, there are still Minnesotans who are not taking advantage of the opportunity to enroll in affordable coverage through MNSure.

## Fiscal Year 2017 Outreach and Education Grants

In working towards its mission of ensuring all Minnesotans have access to quality, affordable health insurance, MNSure's FY2017 Outreach and Education Grants will fund entities experienced in reaching populations who have barriers to enrolling in health insurance coverage or maintaining their coverage. This funding opportunity has been separated from Navigator Outreach and Enrollment grants to more strategically engage the most highly uninsured populations and better integrate this outreach work with MNSure's marketing and communications team. MNSure is open to proposals that include innovative strategies, partnerships and messages to reach those populations that continue to be uninsured. Grants awarded through this opportunity will fund outreach and education activities and may not be used for application and enrollment activities.

MNSure is targeting approximately \$300,000 for outreach and education efforts leading up to and during open enrollment. The 2017 open enrollment period runs from November 1, 2016 through January 31, 2017. Funds are made available through MNSure's Navigator Community Outreach Grants and Communications and Marketing Department.

The goal of this grant program is to reach and educate Minnesotans who could benefit from enrolling through MNSure, including the remaining uninsured or underinsured, and those eligible for financial help, and connect them to free, in-person enrollment assistance offered by MNSure's consumer assistance community – navigators and brokers. This grant initiative, in tandem with the Navigator Outreach and Enrollment Grants, Broker Enrollment Center Initiative, and statewide network of consumer assistance partners, will contribute to an infrastructure of expert MNSure resources and referral networks.

## Data

The Minnesota Department of Health (MDH) and the University of Minnesota recently released the results of the [2015 Minnesota Health Access Survey](#) (MNHA). This survey is conducted every two years and provides an in-depth look into the state of health insurance coverage in Minnesota. The survey results indicate that Minnesota's uninsured rate decreased from 8.2% in 2013 to 4.3% in 2015, approximately a 50% reduction. The survey shows that great strides have been made in covering people who have historically been uninsured, for example:

- The uninsured rate for Black Minnesotans decreased from 14.7% in 2013 to 8.4% in 2015.
- The uninsured rate for American Indian Minnesotans decreased from 18% in 2013 to 8.7% in 2015.
- The uninsured rate for Asian Minnesotans decreased from 14% in 2013 to 3.7% in 2015.
- The uninsured rate for Hispanic/Latino Minnesotans decreased from 34.8% in 2013 to 11.7% in 2015.
- The uninsured rate among adults ages 18 to 34 decreased from 15.2% in 2013 to 7.2% in 2015.

The survey found that the most common reason survey respondents reported being uninsured was due to losing a job (23.6%), though an additional 12.5% report cost being a problem, and another 10.3% cite eligibility concerns.

Despite the very positive news that more Minnesotans have health insurance coverage than ever before, the survey also finds that disparities between White Minnesotans and other races and ethnicities persist. The uninsured rate for White Minnesotans decreased from 6% in 2013 to 3.4% in 2015, well below most other racial or ethnic groups.

MDH also reported on potential sources of coverage for the uninsured. Figure 5 on page 6 of [MDH's survey fact sheet](#) indicates that 22.4% of the uninsured in 2015 were potentially eligible for advanced premium tax credits (APTC) through MNSure. This means that approximately 51,000 Minnesotans may have benefited from credits that would have lowered the cost of their monthly premium.

## **Background**

### **MNSure's Consumer Assistance Program**

The Affordable Care Act (ACA) provided for creation of MNSure's Consumer Assistance Program – navigators, certified application counselors (CACs), brokers – to help individuals, families and small businesses obtain health care coverage through MNSure. Navigators, CACs and brokers are certified by MNSure to help consumers enroll in public and private health care coverage through MNSure. More information about MNSure's Consumer Assistance Program is available [on the MNSure website](#). A list of all currently certified navigators and brokers is available through [MNSure's Assister Directory](#). Applicants for this funding opportunity do not need to be a current MNSure Consumer Assistance Partner.

### **Navigator Outreach and Enrollment Grants**

Since 2013, MNSure has funded community organizations to reach, educate and enroll uninsured Minnesotans into quality, affordable health insurance plans made available through MNSure. As is mentioned above, this funding opportunity that is the subject of this RFP has been separated from the Navigator Outreach and Enrollment grants in order to solicit proposals that include innovative strategies, partnerships and messages to reach those populations that continue to be uninsured. This process also creates better integration between the work of Outreach and Education grantees and MNSure's marketing and communications team.

# Eligibility

## Eligible Applicants

Public, private for-profit and nonprofit entities are eligible to apply for an Outreach and Education Grant. Individuals are not eligible to apply for MNSure grant funding and cannot submit proposals in response to this RFP. Grant awards will go to single organizations.

The following is a list of potential grant structures:

- Single organization
- Paid partnership: A lead agency with partners that receive grant funds.
- Unpaid partnership: A lead agency with partners that do not receive grant funds.
- Mixed partnership: A lead agency with some partners that receive grant funds and some that do not receive funds.

## Technical Requirements

To qualify, the lead agency on the proposal must:

- Have or obtain a [Data Universal Number System \(DUNS\) Number](#). The Federal Government uses DUNS numbers to identify related organizations that are receiving federal funding.
- Have or obtain a [State of Minnesota vendor number](#). The vendor number is needed to make payments to the organization.
- Be registered or obtain registration with the Minnesota Secretary of State.
- Not be the lead agency on any other proposals in response to this RFP.
- Not write a proposal in response to this RFP that is contingent on being awarded a grant through another MNSure grant or partnership opportunity.
- Participate in contract negotiations with MNSure.
- Submit progress reports and financial reports to MNSure.
- Ensure the objectives of any grant award are met.
- Provide coordination amongst grant partners on grant activities, if applicable.
- Designate a project contact to coordinate with MNSure on grant management and monitoring activities and, if applicable, for MNSure initiated outreach and education.
- Provide grant management and coordination, including subrecipient monitoring activities, amongst grant partners on grant activities, if applicable.
- Collaborate with MNSure on efforts to improve data collection related to outreach and/or education efforts.
- Collaborate with MNSure on promotional and community education activities (e.g. collecting consumer stories, utilizing MNSure's events calendar, participating in press conferences posting on social media).

# Outreach and Education Grants

## Overview

MNSure is seeking applicants who can achieve the goal of the FY 2017 Outreach and Education Grant program, an initiative of MNSure's marketing and communications department and Consumer Assistance Program. The goal of this grant program is to reach and educate Minnesotans who could benefit from enrolling through MNSure, including the remaining uninsured or underinsured, and those eligible for financial help. Grants will:

- Find, connect with and educate uninsured Minnesotans about the importance of having health insurance and their options for obtaining coverage through MNSure.
- Support specific outreach strategies for reaching the remaining uninsured and those who could benefit from the financial help only available through MNSure, with an emphasis on outreach activities during the open enrollment period.
- Support the development of consumer education and assister training materials for population(s) of focus.
- Connect consumers to enrollment assistance without requiring grantees to have enrollment capacity themselves.
- Elevate MNSure media and messaging within populations of focus through applicant-driven strategies and through implementation of MNSure's marketing and communications initiatives.

## Award Information

**Funding options:** Applicants may apply for up to \$40,000.

**Type of award:** Grant

**Funds Available:** Multiple contracts will be awarded as a result of this RFP, anticipated to be \$300,000 in total contract awards.

**Period of Support:** The period of support is September 1, 2016, through June 30, 2017.

**Award Notifications:** MNSure anticipates that initial award announcements to selected applicants moving on to phase three of the evaluation will occur on or before August 1, 2016. During the evaluation process, all information concerning the proposal submitted, except identity, address, and the amount requested by the responder, will remain non-public and will not be disclosed to anyone whose official duties do not require such knowledge.

# Application Requirements

## Summary of Application Requirements

Applicants must follow the instructions within this MNSure grant application, complete all required forms and narrative requirements and submit their application through the online site on time. For most application sections, applicants will be required to respond to a series of brief questions and open text boxes to provide their narrative response. The online application will contain character limits for each question. Please review the character limits within the application before drafting responses. Please see the “How to Apply” section of this RFP for instructions on applying through the online site.

## Executive Summary

Applicant must summarize the key elements of its proposal, including the reason for seeking a MNSure grant partnership, identifying the population(s) of focus for their proposal, providing evidence of expertise in effectively serving the population(s) of focus, and a brief description of any grant partners.

**Executive Summary section page limit: 2,500 characters/ less than 1 page**

## Experience

All applicants must demonstrate that the lead agency and any paid or unpaid partners have the ability to execute the outreach and/or education strategy described and meet goals included in Work Plan. Applicants must also clearly describe the role of paid and/or unpaid partners in this section if they are part of the proposal. Additional details and guidelines for this section follow.

**Experience section page limit: 7,000 characters/ approximately 2 pages**

Applicants must:

- Explain why your organization is uniquely situated to reach and/or educate the uninsured, underinsured, or those eligible for financial help only available through MNSure.
- Provide evidence of successful implementation of outreach and/or education tactics for reaching the population(s) of focus, including information on the outcomes of those tactics.
- Describe experience engaging with MNSure and/or engaging the focus population(s) in conversations about health insurance or health care utilization.
- Describe experience working with MNSure navigators or brokers, including explanation of any referral relationships.
- Include experience with or willingness to serve as a population expert in the areas of creating collateral, providing trainings, or serving as an assister resource.

## Strategy

Applicants must clearly describe, with strong supporting impact evidence, strategies that will be used to reach the population of focus, including details on geography served. Applicants must also clearly describe the role of paid and/or unpaid partners in this section if they are part of the proposal. Additional details and guidelines for this section follow.

**Strategy section page limit: 10,500 characters/approximately 3 pages**

Applicants must:

- Identify the specific population(s) of focus that will be served, using available data as part of the rationale for reaching the proposed population. MNSure is specifically looking to increase enrollment through MNSure by focusing on reducing racial/ethnic and geographic health coverage disparities and making sure Minnesotans are aware of and take advantage of financial help only available through MNSure. This includes encouraging them to apply as well as helping them understand the importance of maintaining coverage. Proposals should seek to increase enrollment by focusing on the following areas:
  - Reducing racial/ethnic disparities – For example, immigrant and refugee communities, African Americans, Asian Americans, Hispanics/Latinos and Native Americans.
  - Reducing geographic disparities – Specifically, regions with uninsured rates higher than the statewide average of 4.3% according to the Minnesota Health Access Survey. These regions are: North Central (10.2%), Upper Minnesota Valley (5.4%), Southwest (5.9%), South Central (5.1%) and Twin Cities (4.5%). See [Minnesota Health Access Survey Uninsurance Rates Table](#) and [Regional Map](#).
  - Making sure Minnesotans are aware of and take advantage of financial help only available through MNSure. – For example, young adults, self-employed individuals, employees of small businesses, workers without access to employer-sponsored insurance (ESI), workers losing access to ESI, those enrolled in the individual market outside of MNSure, etc.
- Explain why access to health insurance coverage and health care are important to the population of focus served by the proposal.
- Identify the counties (or other appropriate geographic area) that will be served by this grant.
- Outline the strategies that will be used to reach and/or educate the population(s) of focus for this grant application (specific strategies should be outlined within the Implementation Plan section and template). Provide specific example of how applicants have successfully reached consumers in the past using these strategies. If innovative strategies are proposed, describe why this new approach is likely to be successful.
- Describe what strategies will be used to ensure outreach and/or education activities connect consumers to application and enrollment assistance.
- Describe the specific system or tools that will be used to track and measure success of grant strategies.

## Implementation Plan

Applicants must include their implementation plan by providing a work plan and a staffing plan. The work plan must be filled out using the required template and the goals and strategies should support the goals of the FY 2017 Outreach and Education Grant Program. Goals should be narrow, measurable and achievable. Applicants must also include a staffing plan and clearly describe the role of paid and/or unpaid partners in this section if they are part of the proposal. Selected applicants work plans will be further negotiated and incorporated into a grant contract.

**Implementation Plan page limit: 7,000 characters/approximately 2 pages**



Applicants must use the [Work Plan Template](#) for Outreach and Education Grant. The work plan may cover September 1, 2016 through June 30, 2017 and must reflect that most grant activities will take place leading up to and during the Open Enrollment period (November 1, 2016 through January 31, 2017). Applicants must upload their work plan as a single excel document through the online application.

Goals must clarify how the applicant will:

- Identify, reach, and engage the uninsured, underinsured, or those eligible for financial help about MNSure and health insurance.
- Increase understanding among uninsured or underinsured populations about the importance of health insurance, coverage options and financial help available through MNSure and/or increase awareness among those who are insured that more affordable coverage may be available through MNSure.
- Increase understanding about the availability of application assistance through MNSure's consumer assistance partners.
- Accommodate initiatives and strategies of MNSure's marketing and communications program, including but not limited to:
  - Availability, as requested and capacity allows, to serve as a population expert for MNSure and its partners (trainings, conference calls, site visits, material review or creation).
  - Availability, as requested and capacity allows, to serve as spokesperson and to execute MNSure events and presentations.
  - Utilization of MNSure tools (e.g. Story Bank collection form and MNSureEvents.org online event listing site)

At a minimum, the applicant must include the following goals in their work plan:

- Projected number of outreach and/or education activities, broken out by activity type, including brief description of activity if not obvious. Activities can include, but are not limited to, presentations, hosting community events, tabling, canvassing, phonebanking, material distribution, digital content creation, paid and earned media activities.
- Projected number of consumers reached with MNSure information through these activities, and evidence for this number (for example, an organization might have X number of people on their mailing list and could thus anticipate that Y% will be reached with a MNSure mailer).
- Projected number of referrals to MNSure consumer assister partners and evidence for this number.

The applicant's staffing plan must clarify the following:

- Specific role of staff FTEs supported by the grant and what they will be doing over course of the grant cycle.

## Budget

MNSure grant funds must be used to cover expenses that are clearly service-related (finding, connecting with, educating and referring Minnesotans). In the narrative budget section, applicant must describe:

- Their financial management processes, including how the lead agency will manage paid partners, if applicable.

The proposal must include an overall summary budget and detailed budget for the lead agency, and detailed budgets for each paid grant partner identified in the proposal. Applicant must use the budget templates provided and upload them as attachments.

- [Summary Budget](#)
- [Detailed Budget](#)

MNSure has phased out the online system for ordering MNSure marketing materials. Grantees will have access to basic MNSure brochures, but should request funds for developing and printing materials if those materials are essential to fulfilling grant objectives.

**Character/page limit: 4,500 characters/approximately 1 page for narrative, and as many budget forms as needed for paid partner(s)' budgets**

**Allowable expenses:**

- Costs directly connected to outreach and education objectives, including project coordination, material development, and communications.
- Consultants or contractors: communications, outreach, education, marketing.
- Equipment or supplies: costs to support outreach and education activities, including materials, event fees, and advertising.
- Travel: directly related to outreach and education activities, including staffing outreach and education events, participating in regional networking, and attending training opportunities.
- Other direct: marketing and outreach materials and media placements (detailed communications plan will be mutually agreed on between MNSure and grantee if proposal is selected), translation of outreach materials not provided by MNSure, promotional giveaways of nominal value, printing costs, event space rental, staff training directly related to providing MNSure outreach and/or education.
- Indirect: indirect costs will be capped at 10% unless your organization documents exemption from indirect-cost rules, calculated based on overall grant award amount not by individual partner budget.

**Unallowable expenses:**

- Staff time for application and enrollment assistance.
- Booth or conference fees are not allowable expenses unless it is an event open to the general public and applicant's presence is primarily focused on achieving the goals of this grant.
- Costs to provide direct health care services to individuals.
- Meeting matching requirements of any other federal program.
- Non-project related executive compensation.
- Selling a specific or limited set of insurance or insurance-like products, including discount plans.
- Promotion of federal or state legislative and regulatory modifications.
- Improvements in systems or processes solely related to Medicaid/CHIP, or any other state or federal program's eligibility (lobbying).
- Activities such as retreats.
- Services, equipment or support that are the legal responsibility of another party under federal or state law (e.g., vocational rehabilitation or education services) or under any civil rights laws.

- Supplanting other grant funds, or otherwise misusing or misappropriating grant funds.

## Letters of Support

Letters of support from **paid** partners **must** be submitted with the proposal. A paid partner is an organization that will receive grant funds. An unpaid partner is an organization that will not receive grant funds. A letter of support or agreement must provide a brief summary of the paid partner's support and role in achieving the objectives of the proposal. It must also list all proposals the agency is included on as a paid partner. It must be submitted on the paid partner's letterhead and signed. The applicant will upload letters of support from multiple paid partners as single document through the online grant application system. There is only one attachment upload for letters of support. Letters of support from **unpaid** partners are **not required**.

If selected for an award, the lead agency will need to submit copies of subcontracts with paid partners to MNsure.

## Required Statements

The following are required documents that must be included with your proposal. Complete the attachments and upload them as the "Required Statements" section of your proposal.

- [Attachment A – Declarations and Signature](#)
- [Attachment B - Affidavit of Noncollusion](#)
- [Attachment C - Certification Regarding Lobbying](#)
- [Attachment D – Exceptions to Terms and Conditions](#)
- [Attachment E – Trade Secret/Confidential Data Notification](#)

## How to Apply

Applicants must submit their proposal using the online application site hosted by Foundant Technologies. Applicants will be required to set up a secure account in order to submit an application. Each organization must submit the application using a single user account. Once an applicant sets up an account, they will have access to the online submission forms. A lead agency may only apply to one funding area. Current 2016 grantees are encouraged to apply using their current active Foundant accounts.

A link to the application site, as well as instructions on how to set up an account will be posted on the MNsure.org on or before April 5, 2016. Through the online grant application site, applicants will create an account, fill out required fields, fill out narrative fields and upload required documents. All format specifications will be posted there for the applicant to follow. The online forms will follow the character limits for each section specified in this RFP. Character limits include spaces. Applicants will not be allowed to exceed the character limit for each section.

Applicants may also save their work and come back later to finish after they start an application and print out the application they submitted.

### Basic Steps for Applying Online

Detailed steps for applying online will be provided during the Applicant Webinars on April 5 and 14, 2016 and will be posted on the [MNsure website](#).

1. Create an account through MNsure's grant application system (Foundant Technologies). The link to the online application will be available on [MNsure's website](#) under How to Apply on or before April 5, 2016.
2. Select the FY 2017 Outreach and Education Application Form.
3. Complete the general organization information and proposal summary information.
4. Complete each proposal section, including Executive Summary, Experience, Strategy, Implementation Plan and Budget.
5. Upload all Required Statements – Attachments A through E.
6. Click Preview button to review inserted application information to make sure all required information is included.
7. Submit application by selecting the Submit button.

### **Tips for Applying Online**

- Review application requirements in this RFP.
- Create an account through the online grant application system as soon as it is available.
- Each RFP has a unique set of application forms, applicants should make sure that they are submitting their information using the correct set of forms.
- Pay attention to character limits with spaces. Applicants are encouraged to draft their answers in a Word document to ensure they stay within the character limits. You can check character limits in a Word document by highlighting the text and selecting "word count" on the Review panel near the top. The online application system tracks the number of characters in a section as the applicant fills that section in and will stop capturing the information you type if you exceed the character limits. The character limits for each field and open text box are posted next to each question in the online application.
- Pay attention to file size limits for the required files to upload. The file size limits are included in the online application next to each upload box.

### **Training Videos**

MNsure will provide an overview of how to apply through Foundant during the Applicant Webinars on April 5 and 14, 2016. Applicants may also view the following Foundant training videos:

- [Foundant Registration Flow](#)
- [Foundant Application Flow](#)

### **Technical Support**

Applicants encountering error messages on the Foundant site can follow the instructions in the pop-up window that comes up when the site is having an issue. All other questions should be emailed to [outreach@mnsure.org](mailto:outreach@mnsure.org).

# RFP Process

## Applicant Webinar

MNSure will hold two applicant webinars. The first webinar will be at 2:30 p.m. Central Time on April 5, 2016. The second webinar, covering the same information as the first, will be at 9:30 a.m. Central Time on April 14, 2016. Participants must register for both webinars if they would like to participate on both days.

### Webinar Details

- April 5, 2016 at 2:30 p.m. Central Time
  - [WebEx Meeting Link](#)
  - Meeting Number: 597 433 031
  - Meeting Password: 04052016
- April 14, 2016 at 9:30 a.m. Central Time
  - [WebEx Meeting Link](#)
  - Meeting Number: 599 662 170
  - Meeting Password: 04142016

Follow these steps to register for the webinars:

1. Follow the WebEx links for each webinar.
2. Enter the Meeting Number that corresponds to the webinar date in the box provided.
3. Click "Register."
4. Type in your first name, last name, email address and company. These are the only required fields for registration.
5. An email confirmation with instructions for joining the meeting will be sent as soon as you register.

More information regarding the webinar is available on the [MNSure website](#). Oral answers given during the webinar will be non-binding. Written responses to questions asked during the webinars will be posted on MNSure.org by April 21, 2016.

## Applicant Questions

It is the policy of MNSure to assist applicants with their inquiries during the application process.

Applicants' questions regarding this RFP must be emailed by 1 p.m. Central Time on Friday, May 6, 2016. All questions must be emailed to [outreach@mnsure.org](mailto:outreach@mnsure.org). Questions sent to other email boxes or individual staff member email boxes will not be responded to. Other personnel are NOT authorized to discuss this RFP with responders before the proposal submission deadline. Contact regarding this RFP with any MNSure personnel not following the process described here could result in disqualification. The State will not be held responsible for oral responses to responders.

Questions will be addressed in writing and posted on the MNSure website no later than May 12, 2016. MNSure will post generalized answers while maintaining the confidentiality of the potential applicant and any specifics about their proposal.

## Proposal Submission

Applicants must submit proposals using the online submission process described on the [Outreach and Education Grant RFP webpage](#). All applications **must be received on or before 1:00 p.m. Central Time on May 26, 2016. Applications received after this deadline will not be considered.**

Applicants should email [outreach@mnsure.org](mailto:outreach@mnsure.org) if they experience a technical issue while submitting their proposal. MNsure encourages responders to allow for the time necessary to ensure successful submission of the proposal.

## Contract Negotiation

The contents of this RFP and the proposal of the successful applicants may become part of the final contract if a contract is awarded. Each applicant's proposal must include a statement of acceptance of all terms and conditions stated within this RFP or provide a detailed statement of exception for each item excepted by the applicant. Applicants who object to any condition of this RFP must note the objection within Attachment D, "Exceptions to Terms and Conditions," referenced above in the "Required Documents" section. If an applicant has no objections to any terms or conditions, the applicant should write "None" on the form.

Each applicant should be aware of MNsure's standard contract terms and conditions in preparing its response. A [sample grant contract](#) is available for your reference. Much of the language reflected in the contract is required by law or policy. If you take exception to any of the terms, conditions or language in the contract, you must indicate those exceptions in your response to the RFP in Attachment D also. Only those exceptions indicated in your response to the RFP will be available for discussion or negotiation. Further, although this RFP establishes the basis for proposals, the detailed obligations and additional measures of performance will be defined in the final negotiated contract.

## Evaluation and Selection

### Review Process, Criteria and Selection

All responsive proposals received by the deadline will be evaluated by MNsure. The MNsure review and selection process will occur in three stages.

During the evaluation process, all information concerning the proposal submitted, except identity, address, and the amount requested by responder, will remain non-public and will not be disclosed to anyone whose official duties do not require such knowledge.

Nonselection of any proposals will mean that either another proposal(s) was determined to be more advantageous to MNsure or that MNsure exercised the right to reject any or all proposals.

At its discretion, MNsure may perform an appropriate cost and pricing analysis of a responder's proposal, including an audit of the reasonableness of any proposal.

#### **Stage 1: Evaluation based upon completeness, compliance and eligibility**

This evaluation will occur immediately following submission of a proposal to ensure an application meets MNsure requirements. Applications that are deemed non-responsive will not be forwarded for Stage 2 review.

## Stage 2: Merit review (Evaluation of proposal requirements/relevance)

MNsire will utilize a review committee made up of internal (MNsire staff) and external reviewers to review the merits of each proposal. The review committee will use a 100-point scale to evaluate the merit of each proposal. After scores are added up for each proposal, proposals are compared to each other.

Reviewers will consider the following selection criteria in determining overall merit scores (refer back to the Application Requirements section for expectations in each area). In each area, proposals will be rated on responsiveness to the RFP's required elements and ability of the proposal to help MNsire meet the goals of the grant program.

Executive Summary	5 %
Experience	30 %
Strategy	25 %
Implementation Plan	25 %
Budget	15 %

## Stage 3: Financial Review

MNsire staff will review applications for fiscal compliance with MNsire grant policies and procedures. These include budget reasonableness, budget justification and use of funds in addition to the organization's financial management capabilities.

Applicants *selected* to move on to Stage 3 will be asked to submit evidence of the organization's financial management capabilities. Specifically, applicants must submit an Accounting System and Financial Capacity Questionnaire and one of the following documents depending on the size of the applicant's annual revenue:

- Applicants with a total annual revenue of less than \$50,000 or that have not been in existence long enough to have a completed IRS Form 990 or audit must submit their most recent board-reviewed financial statements.
- Applicants with a total annual revenue of \$50,000 or more and less than \$750,000 must submit their most recent IRS Form 990.
- Applicants with a total annual revenue of more than \$750,000 must submit their most recent certified financial audit.

During this stage, MNsire reserves the right to negotiate on specific areas of the application, to request additional information needed to clarify questions or to establish financial management capability and to conduct background checks. Final recommendation decisions will be based on the successful outcome of the financial review and negotiations. Final award decisions will be made following this step.

## Grant Administration Requirements

The following is an overview of the requirements that grantees must meet. Full post-award administration requirements will be included in the terms and conditions of the award and contract. MNSure's goal is to manage funded projects through a streamlined process that limits administrative burdens on the grantees while ensuring proper oversight.

### Minnesota Secretary of State

MNSure will verify that the entity is currently registered with the Minnesota Secretary of State and maintains an "Active / In Good Standing" status.

### Attestation and Disclosure

All grantee entities will be required to sign a conflict of interest disclosure statement ([Attachment A – Declarations and Signature](#)) as referenced in the Minnesota State Rules relating to Consumer Assistance Services.

### Evaluation Requirements

#### Financial Reports

Grantees will be required to submit financial reports throughout the contract time period. Further information will be provided in the terms and conditions of award.

#### Financial Accounting of Federal Funds

Grantees will be required to keep a detailed accounting of how MNSure federal funds are being used. Financial records of grantees associated with grant-funded activities are subject to potential random audits.

#### Interim Progress Report(s)

Grantees may be required to submit a monthly progress report. The format and due dates for progress reports will be included within the terms and conditions of award.

#### Final Reports

Final reports are due 30 calendar days following the expiration date. The content and format of this report will be included within the terms and conditions of award.

#### Monitoring

To ensure appropriate oversight, grantees may be subject to random monitoring and audits of grant-funded activities.

### Program Requirements

#### Project Work Plan

Selected applicants will work in coordination with MNSure to finalize a work plan that may include revised goals, performance measures and a communications plan.

#### Performance Metrics

In an effort to measure the impact of MNSure's grant program and make continuous improvements, MNSure will be establishing performance metrics with selected applicants. Requirements for performance metrics will be included within the terms and conditions of award.



### **Publishing**

It is MNSure policy that the results and accomplishments of the activities funded through this solicitation are made available to the public. Organizations are expected to make the results and accomplishments of their activities available to the public. Grantees may be asked to prepare a summary of their project and allow its use on the MNSure website and in MNSure materials.

### **Access to Funds**

At the beginning of the grant period, grantees may request an advance payment covering the first 30 days of work. Any advance payments must be reconciled within 12 months of issuance or within 60 days of the end of the grant period. This is a one-time-only advance and grantees will be asked to justify with specificity the need for an advance. Generally, grantees will be reimbursed for work completed on a monthly basis. Following notification of award, MNSure will work with grantees to complete the information needed to facilitate payment. No direct payments will be made to an individual. All compensation will be paid to the affiliated entity.