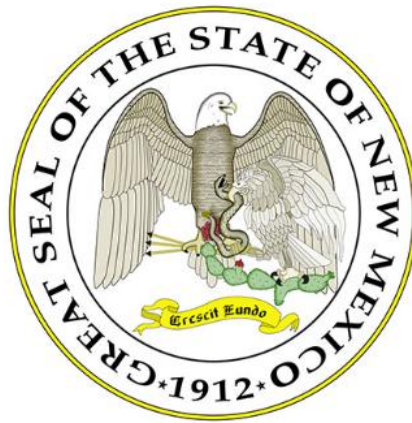


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REGULAR MEETING OF THE BOARD OF DIRECTORS



May 12, 2026

9:30 AM

CNM Workforce Training Center
5600 Eagle Rock Ave NE, Albuquerque, NM 87113

[Click here to join online at
https://meet.goto.com/NMRHCA/boardmeeting](https://meet.goto.com/NMRHCA/boardmeeting)

To join via Telephone call 1-224-501-3412

and use access code 724-176-285

New Mexico Retiree Health Care Authority

Regular Meeting

BOARD OF DIRECTORS

ROLL CALL

May 12, 2026

Member in Attendance			
Dr. Lee Caruana, President			
Dr. Tomas Salazar, Vice President			
Lance Pyle, Secretary			
NM Treasurer Laura Montoya			
Raquel Alirez			
Dr. Gerry Washburn			
Donna Sandoval			
Therese Saunders			
Alex Castillo-Smith			
Renee Garcia			
Kate Brassington			

NMRHCA BOARD OF DIRECTORS

MAY 2026

<p>Dr. Lee Caruana, MD Retired Public Employees of NM leecaruana13@gmail.com</p>	<p>Donna Sandoval NM Municipal League 100 Marquette Ave City/County Building Albuquerque, NM 87102 donnasandoval@cabq.gov 505-768-2975</p>
<p>Dr. Tomas E. Salazar, PhD, Vice President NM Assoc. of Educational Retirees PO Box 66 Las Vegas, NM 87701 salazarte@plateautel.net 505-429-2206</p>	<p>Therese Saunders, President NEA-NM, Classroom Teachers Assoc., & NM Federation of Educational Employees 5811 Brahma Dr. NW Albuquerque, NM 87120 tasaunders3@mac.com 505-934-3058</p>
<p>Lance Pyle, Secretary NM Association of Counties Curry County Administration 417 Gidding, Suite 100 Clovis, NM 88101 lpyle@currycounty.org 575-763-3656</p>	<p>Alex Castillo Smith Deputy Cabinet Secretary NM Health Care Authority PO Box 2348 Santa Fe, NM 87504 alex.castillosmith@hca.nm.gov 505-629-8652</p>
<p>The Honorable Ms. Laura M. Montoya NM State Treasurer 2055 South Pacheco Street Suite 100 & 200 Santa Fe, NM 87505 laura.montoya@sto.nm.gov 505-955-1120</p>	<p>Renee Garcia Alternate for ERB Executive Director Educational Retirement Board PO Box 26129 Santa Fe, NM 87502-0129 renee.garcia@erb.nm.gov 505-531-9885</p>
<p>Raquel Alirez Classified State Employee 401 Broadway NE Albuquerque, NM 87102 raquel.alirez@dws.nm.gov 505-365-3474</p>	<p>Kate Brassington Alternate for PERA Executive Director Public Employees Retirement Association 33 Plaza La Prensa Santa Fe, NM 87507 kate.brassington@pera.nm.gov 505-309-1088</p>
<p>Dr. Gerry Washburn. Ed. D. Superintendents' Association of NM 408 N Canyon Carlsbad, NM 88220 gerry.washburn@carlsbadschools.net</p>	

**REGULAR MEETING OF THE
NEW MEXICO RETIREE HEALTH CARE AUTHORITY
BOARD OF DIRECTORS**

May 12, 2026, at 9:30 AM

Meeting to Be Held at CNM Workforce Training Center
5600 Eagle Rock Ave NE, Alb. NM 87113

[Click Here to Join Via Video Conference](#)

To Join Via Telephone call (224)-501-3412 and use access code 724-176-285

AGENDA		PAGE
1.	Call to Order	Dr. Caruana, President
2.	Roll Call to Ascertain Quorum	Ms. Beatty, Recorder
3.	Pledge of Allegiance & Salute to New Mexico State Flag	Dr. Caruana, President
4.	Approval of Agenda	Dr. Caruana, President 4
5.	Approval of Regular Meeting Minutes from April 7, 2026	Dr. Caruana, President 6
6.	Public Forum and Introductions	Dr. Caruana, President
7.	Committee Reports	Dr. Caruana, President
8.	Staff Updates	
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b.	Medicare Solvency	Ms. Atencio, Deputy Director
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e.	BlueCross BlueShield and Lovelace/Ardent Contract Negotiations	Mr. Kueffer, Executive Director
f.	Legislative	Mr. Kueffer, Executive Director
g.	March 31, 2026, SIC Report	Mr. Kueffer, Executive Director 20
h.	FY27 Operating Budget	Mr. Kueffer, Executive Director 21
9.	FY26 3 rd Quarter Budget Report	Ms. Atencio, Deputy Director 36
10.	RFP FY27 for Lobbyist Services	Ms. Atencio, Deputy Director 42
11.	2027 Preliminary Plan Discussions	Mr. Kueffer, Executive Director 93
12.	Medicare EGWP Reimbursement Provisions	Mr. Kueffer, Executive Director

- | | | |
|-----|---|------------------------|
| 13. | Other Business | Dr. Caruana, President |
| 14. | Date & Time of Next Board Meeting
June 2, 2026
CNM Workforce Training Center
5600 Eagle Rock Ave NE
Albuquerque, NM 87113 | Dr. Caruana, President |
| 15. | Adjourn | |

MINUTES OF THE
NEW MEXICO RETIREE HEALTH CARE AUTHORITY
BOARD OF DIRECTORS

REGULAR MEETING

April 6, 2026

CALL TO ORDER

A Regular Meeting of the Board of Directors of the New Mexico Retiree Health Care Authority was called to order at 9:30 a.m. at the CNM Workforce Training Center, 5600 Eagle Rock Road, N.E., Albuquerque, New Mexico.

ROLL CALL TO ASCERTAIN A QUORUM

A quorum was present. [*Virtual attendance]

Members Present:

Dr. Lee Caruana, President
Mr. Lance Pyle, Secretary *
Hon. Laura M. Montoya, NM State Treasurer
w/designee Christina Anaya
Dr. Gerry Washburn *
Ms. Donna Sandoval
Ms. Therese Saunders
Ms. Renee Garcia
Ms. Kate Brassington

Members Excused:

Dr. Tomas Salazar, Vice President
Ms. Raquel Alirez
Ms. Alex Castillo-Smith

Staff Present:

Mr. Neil Kueffer, Executive Director
Ms. Linda Atencio, Deputy Director Ayanniyi

Ms. Sheri Ayanniyi, Chief Financial Officer
Mr. Raymond Long, IT Director
Mr. Alexander George, Network Administrator
Ms. Judith Beatty, Recorder

PLEDGE OF ALLEGIANCE & SALUTE TO NEW MEXICO STATE FLAG

APPROVAL OF AGENDA

Treasurer Montoya moved approval of the agenda. Ms. Saunders seconded the motion, which passed unanimously.

APPROVAL OF MEETING MINUTES: February 3, 2026

Ms. Saunders moved approval of the minutes of the February 3, 2026, meeting. Ms. Sandoval seconded the motion, which passed, with Treasurer Montoya in abstention.

PUBLIC FORUM AND INTRODUCTIONS

Attendees introduced themselves.

COMMITTEE REPORTS

Ms. Brassington reported that the Finance Committee met on March 31 and recommended approval of the five action items that are on today's agenda.

Chairman Caruana reported that the Executive Committee met on March 31. The committee received an update from the executive director, approved today's agenda, and reviewed action items on today's agenda.

STAFF UPDATES

Wellness Fairs

Ms. Atencio reported that NMRHCA would hold wellness fairs at three locations: May 13 in Santa Fe, May 14 in Albuquerque, and May 28 in Las Cruces. A virtual wellness fair will take place on May 27. This year, the theme is "Walking the Next Mile, a Camino-inspired

Wellness Experience.” There will be speakers and door prizes, various activities and lunch. Vendors will be present to respond to questions from members.

BCBSNM & Lovelace/Ardent Contract Negotiations

Ms. Atencio reported that NMRHCA has been notified by Blue Cross Blue Shield of New Mexico (BCBSNM) that they are in negotiations with the Lovelace Health System. If they do not come to terms, the contract will terminate on June 1 and all Lovelace facilities and its physicians and providers will be out-of-network with BCBSNM. Lovelace has posted the notification on their website that they are in negotiations, and there has been media coverage by Lovelace encouraging members to contact their boards, agencies, employers, etc.

Ms. Atencio said NMRHCA has been talking with BCBSNM. The main thing Lovelace is requesting is additional funding for their reimbursements. They have a transition plan in place to assist any members who have ongoing care or upcoming surgeries. NMRHCA is beginning to receive calls from members, including two members who have upcoming surgeries scheduled, and is working with BCBSNM very closely to address any problems being encountered.

Express Scripts/BRG Data Breach

Mr. Kueffer reported that Berkeley Research Group, LLC, (BRG) an organization that worked with Express Scripts, experienced a data breach in March 2025. NMRHCA was informed that 263 members on the commercial 365 plan and 971 members on the EGWP were compromised.

Mr. Kueffer commented that the length of time it took to inform NMRHCA of this breach along with the time it took to involve the affected members is very concerning. BRG completed its analysis in November 2025, eight months after the initial data breach. Express Scripts conducted an initial review at that time, which was completed on December 24, 2025, and began notifying its clients on March 10, 2026.

Mr. Kueffer said the NMRHCA has posted information about the data breach on its website and is actively working to adopt updated language to its contracts and with IBAC partners in areas relating to data breaches and cybersecurity.

Chairman Caruana asked if language will be added to these contracts requiring that the agency be informed of any data breaches within a certain timeframe. Mr. Kueffer responded that staff is looking into this, including adding language specific to HIPAA requirements.

Chairman Caruana commented that, when this came up the last time, the consensus of the board was that, if any NMRHCA members were affected by a data breach, the agency should be informed immediately even if the investigation was not completed.

Legislative

Mr. Kueffer stated that the following legislation was passed in the last session that would affect NMRHCA:

- SB20, Prior Authorization & Prescription Drugs: Adds medication prescribed to treat serious mental illness to a list of conditions where prior authorization and step therapy are prohibited except when a generic, biosimilar, or interchangeable biologic is available.
- HB38, Wheelchair Insurance Coverage.
- HB47, School Employee Insurance Programs. Moving schools to the 80/20 contribution rate and adds language implementing reference-based pricing for hospital services. Prohibits hospitals from billing members beyond maximum established payments.

New Mexico State Investment Council: New Chief Investment Officer

Mr. Kueffer announced that Kristin Varela has been appointed as Chief Investment Officer of the NM State Investment Council. Ms. Varela previously served as CIO of the Employees Retirement System of the State of Hawaii, and prior to that was Interim CIO of PERA.

Treasurer Montoya noted that Ms. Varela is from Pecos and is one of the very few Latinas in the United States who is a chief investment officer, and now will be CIO of the second-largest sovereign wealth fund in the U.S. The search for CIO was comprehensive and included an evaluation of hundreds of candidates from internationally recognized sovereign wealth funds, public pensions, endowments, foundations, and other institutional investors.

QUARTERLY INVESTMENT REPORTING

[Presenters: Paul Cowie and Jared Pratt, Meketa Investment Group]

Mr. Cowie reviewed updates:

- As of December 31, 2025, the Fund was valued at \$1.95 billion. During the fourth quarter the Fund returned 2.3%, which brought the YTD return to 13.7%. All asset classes were within 0.5% of their policy targets.
- At the October 1, 2025, SIC trading window, trades were implemented in each investment pool to align with the new asset allocation policy.

Mr. Pratt presented an economic and market update.

NEW MEXICO RETIREE HEALTH CARE AUTHORITY INVESTMENT POLICY

[Presenters: Paul Cowie and Jared Pratt, Meketa Investment Group]

Mr. Kueffer stated that this draft of the Investment Policy contains additional revisions incorporated after the December board meeting.

Mr. Kueffer said the SIC reviewed the document and had no changes but noted that the SIC uses Cambridge as its private equity benchmark, which NMRHCA does not have access to. NMRHCA is using a secondary benchmark used by Meketa, which SIC thought was a reasonable choice. NMRHCA would still have the RVK report for reference, which would supplement the policy document.

Responding to Chairman Caruana regarding the benchmarks, Mr. Pratt stated that the Cambridge benchmark uses actual returns from private equity. The other benchmark is based on the public markets plus 3% and he feels that is a good bogey for private equity over a 5–10-year period. For short time periods like that last year, for instance, there was a lot of underperformance due to the huge returns in the US equity markets. He added that Meketa has access to the Cambridge benchmark but Cambridge licenses it on a client-by-client basis. For NMRHCA to utilize it, it would have to pay \$10,000-\$12,000 just to include that benchmark in its reporting. He noted that the benchmark can be seen in RVK's reporting.

Responding to Treasurer Montoya, Mr. Pratt said there are other private equity benchmarks, but they thought using the MSCI ACW +3 would be the best fit as a secondary benchmark to what RVK is using in their reporting.

Mr. Pratt reviewed the Investment Policy revisions.

Treasurer Montoya moved for approval of the updated investment policy with the amendment on page 61, number 7, adding in compliance with JPA, and on page 65, section VIII.3, adding in the dates required based on the JPA, which is no later than 60

days after the end of the fiscal year and no later than 60 days after the end of the fiscal quarter of each year.

Ms. Brassington seconded the motion, which passed unanimously. [Ms. Sandoval was not present during the vote.]

IT CONTRACT DOCUMENT SCANNING

Raymond Long, Chief Information Officer, requested approval to enter into a small contract with Revolution Data Systems to provide professional services for implementation of an upgrade to its document imaging platform. NMRHCA has worked with this vendor before. Services will include system configuration, testing to ensure full functionality, and staff training on new features and scanning capabilities. The total cost for these services is not to exceed \$7,500, based on an estimated 30 hours at a rate of \$250 per hour.

Ms. Brassington stated that the Finance Committee approved this request.

Ms. Brassington moved for approval. Treasurer Montoya seconded the motion, which passed unanimously.

[Treasurer Montoya left the meeting. Her deputy, Christine Anaya, joined the meeting.]

IT CONTRACT WEB PORTAL

Chief Information Officer Raymond Long requested approval to execute a new work contract with RealTime Solutions in the amount of \$25,281.11, utilizing the existing Professional Services budget.

Mr. Long stated that staff has been working on the NMRHCA WebPortal General Enrollment Application project, which is hosted RealTime Solutions, for some time and is in the testing phase. A few bugs have been popping up along the way and those are being addressed as they occur. A key enhancement identified in the rollout is the development of a Rate Plan and Calculation Gateway. This would allow NMRHCA IT staff to independently enter and manage rate plans and associated calculations. This would improve operational efficiency, reduce reliance on the external vendor, lower ongoing costs, and provide greater internal control and responsiveness

To support continued improvement, additional development work is required to address identified issues and enhance functionality. Proposed updates include:

- Improving Dental and Vision plan selection options;

- Ensuring consistent plan selection or all individuals enrolled in non-Medicare coverage;
- Implementing stronger validation controls;
- Developing administrative tools for NMRHCA IT staff;
- Requiring secure document uploads;
- Adding a checklist page to guide users through required steps and documentation.

Ms. Brassington stated that this request was approved by the Finance Committee.

Ms. Brassington moved for approval. Ms. Saunders seconded the motion, which passed unanimously.

FY26 CONTRACT AMENDMENTS

Ms. Atencio stated that NMRHCA staff will be amending and reallocating funds for a couple of FY26 contracts. The funds being reallocated come from the Unencumbered Balance Fund, which was approved as part of the FY26 budget. NMRHCA will increase the PBM agreement with Express Scripts by \$12 million in anticipation of funding shortfalls driven by rising pharmacy costs.

Under Program Support, Ms. Atencio said NMRHCA wants to increase the Rodey law firm's contract by \$30,000 and add two new contracts: Revolution Data System for \$7,500 and Real Time Solutions for \$25,282.

FY27 OPERATING BUDGET

Ms. Ayanniyi presented this report.

Ms. Brassington stated that the Finance Committee approved this request.

Ms. Brassington moved for approval. Ms. Sandoval seconded the motion, which passed, with Ms. Anaya abstaining.

FY27 CONTRACT AMENDMENTS/NEW

Ms. Ayanniyi reviewed a list of proposed FY27 contracts administered through Program Support.

Ms. Brassington stated that the Finance Committee approved this request.

Ms. Brassington moved for approval. Ms. Saunders seconded the motion, which passed unanimously.

OTHER BUSINESS

None.

DATE AND TIME OF NEXT BOARD MEETING

May 12, 2026 -- 9:30 AM
CNM Workforce Training Center
5600 Eagle Rock Avenue, NE, Albuquerque, New Mexico 87113

ADJOURN: 11:40 a.m.

Accepted by:

Lee Caruana, President



This version has been updated
to correct Trust Fund amounts
in the Finance and Investment Section

BENEFITS MESSENGER

THE NMRHCA Newsletter

EXECUTIVE DIRECTOR'S MESSAGE

The basketball season has come to an end, and the familiar pastime of baseball has begun. For many, this time of year also brings the start of planting a garden, enjoying the extra daylight, or simply getting outdoors.

For me, it's an opportunity to work in the yard, take a walk along a nearby path, or spend time with family. Whether it's being outside or enjoying nature, I find this season refreshing and rejuvenating. I hope this time of year brings you a sense of peace, comfort, and enjoyment as well.

If you're looking for ways to support your health and well-being, I encourage you to join us at one of our upcoming Wise & Well Wellness Fairs—either in person or virtually.

At the New Mexico Retiree Health Care Authority (NMRHCA), we remain committed to supporting our members through meaningful programs, resources, and ongoing communication. We continue to monitor legislative and regulatory developments closely to ensure your benefits remain protected.

We are also encouraged by the continued progress in strengthening the long-term sustainability of the Retiree Health Care Trust Fund. Through disciplined financial management and strategic planning, we remain focused on protecting benefits for current and future retirees.

Thank you for allowing us to serve you and support your health care needs.

Neil Kueffer, Executive Director

FINANCE & INVESTMENT UPDATE

As of June 30, 2025, the New Mexico Retiree Health Care Authority (NMRHCA) continues to demonstrate measurable progress in strengthening the long-term sustainability of the Retiree Health Care Trust Fund.

The Trust Fund June of FY2025 is reported at **\$1.8 billion** compared to \$1.5 billion in 2024 and \$1.2¹⁴ billion

in 2023. **Total OPED liability for FY2025 is \$3.42 billion.** While total liabilities can fluctuate year to year due to actuarial assumptions and market conditions, the more important measure of long-term stability is the net liability and funded ratio — both of which show meaningful improvement.

Most notably, the plan's **funded status increased to 54.52% in 2025**, up from 46.99% in 2024. This marks a dramatic improvement over recent years:

- 44.16% in 2023
- 33.33% in 2022
- 25.39% in 2021

In just four years, the funded ratio has more than doubled — a clear indicator that the long-term strategy to grow the Trust Fund and responsibly manage liabilities is producing tangible results.

While challenges remain, these trends demonstrate disciplined financial stewardship and continued forward momentum. NMRHCA remains committed to protecting retiree health benefits while strengthening the plan's long-term solvency for current and future retirees.

LEGISLATIVE UPDATE

The New Mexico Legislature concluded its 2026 regular session on February 19 after a busy 30-day short session. Constrained by its shorter timeline, legislative energy focused on key priorities including budget, education and a significant slate of health care legislation.

At this time, it does not appear that any of the legislation passed during the 2026 short session and currently awaiting the governor's signature will have a direct impact on the New Mexico Retiree Health Care Authority or its members. While several health care bills address broader systemic issues, such as provider shortages and Medicaid funding stability, none are expected to directly alter NMRHCA plans, benefits, or premiums. NMRHCA remains committed to closely monitoring legislative developments and will continue to keep retirees informed of any significant changes and the potential impact such legislation may have on their health care coverage.



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2026

THE ANNUAL NMRHCA
WELLNESS FAIR



WALKING THE NEXT MILE

A Camino-Inspired
Wellness Experience

PRESENTATIONS

-  **Why We Walk: Lessons from the Road to Santiago de Compostela, Spain**
Presenter: Sarita & Tom Loehr, Retirees, Adventurers
-  **Walking the Good Life: Why Our Brain Needs Friends**
Presenter: Ana Hernandez, MS RD LD
-  **Strong Enough for the Road: Movement, Resilience, & Joy of the Next Step**
Presenter: Jackie Pacheco, MPH
-  **Listening to the Quiet Voice: Finding Meaning in your Own Pilgrimage**
Presenter: Jess Biggs, MS



CLICK OR SCAN HERE
FOR DETAILED INFO &
REGISTRATION



www.nmrhca.org/2026wellnessfair/

Activities
Door Prizes
Give Aways
Lunch

IN PERSON

May 13th in Santa Fe

May 14th in Albuquerque

May 28th in Las Cruces

VIRTUAL

May 27th

PRESORT STD
 US POSTAGE PAID
 ABQ., NM
 PERMIT #1645

Carrier Contact Information

Blue Cross Blue Shield (BCBS) www.bcbsnm.com/nmrhca	800-788-1792	Presbyterian Health Plan www.phs.org	888-275-7737
BCBS Medicare Advantage www.bcbsnm.com/nmrhca	800-618-6156	Presbyterian Medicare Advantage www.phs.org	800-797-5343
Express Scripts Medicare www.express-scripts.com	800-551-1866	Humana Medicare Advantage https://ourhumana.com/nmrhca	866-396-8810
Express Scripts Non-Medicare www.express-scripts.com	800-501-0987	UnitedHealthcare Medicare Advantage www.uhcretiree.com/nmrhca	866-622-8014
Davis Vision www.davisvision.com	800-999-5431	Delta Dental www.deltadentalnm.com	877-395-9420
Blue Cross Blue Shield Dental www.bcbsnm.com/nmrhca	877-723-5697	Standard Insurance www.standard.com/mybenefits/newmexico_rhca	888-609-9763

NMRHCA Contact Information

Albuquerque Office:	6300 Jefferson St. NE, Suite 150 Albuquerque, NM 87109-3392	Santa Fe Office:	33 Plaza La Prensa Santa Fe, NM 87507
Telephone:	800-233-2576	Hours:	Monday-Friday 8:00AM – 5:00PM
Fax:	505-884-8611		
Website:	www.nmrhca.org	Email:	customerservice@rhca.nm.gov
Facebook:	www.facebook.com/nmrhca		

NMRHCA Website Accessibility Compliance Update

Background

The U.S. Department of Justice established a legal requirement under the Americans with Disabilities Act (ADA) mandating that all web content meet Web Content Accessibility Guidelines (WCAG 2.1) standards by April 24, 2026. Many government agencies, including NMRHCA, were not aware of this requirement until early 2026. Upon learning of it, NMRHCA immediately launched a project to bring its website, forms, and public documents into compliance.

While full compliance by the original deadline was not achievable given the limited lead time and resources, NMRHCA established a structured schedule of milestones to pursue compliance as urgently as possible.

On April 20, 2026, the DOJ extended the compliance deadline by 12 months to **April 24, 2027**. Despite this extension, NMRHCA is continuing on its original project timeline to reach compliance as quickly as possible.

What Accessibility Compliance Requires

Accessibility compliance encompasses a broad range of standards. Key requirements include:

- **Readability:** Appropriate font, font size, color, and document structure using proper heading, subheading, and paragraph formatting
- **Screen reader compatibility:** Content must be readable by assistive technologies in a logical sequence
- **Keyboard navigation:** All content must be navigable using the Tab key
- **Alternative text:** All images and graphics must include descriptive alt text
- **Accessible tables:** Table columns and rows must be structured so screen readers can associate related content
- **Color contrast:** Colors used throughout must meet minimum contrast ratio requirements

What This Means for NMRHCA

- Our **website** must be updated to meet WCAG 2.1 standards

- **Public documents** published on our website, including agendas, announcements, and board books, must be compliant
- Our **forms** must be updated to meet accessibility requirements

What We Are Doing

- We engaged third-party web developer **Real Time Solutions** to bring our website into compliance. That work was completed on **April 24, 2026**.
- We are evaluating third-party accessibility testing applications to verify the developer's work and support ongoing compliance monitoring. A selection will be made and implemented in the near term.
- **Agendas and meeting notices** have been made compliant as of **April 24, 2026**.
- We are actively working to update all **forms and documents** published on our website.
- We have contacted all **third-party partners**, including carriers and consultants who provide content published on our site, to request a compliance status report and are working with those who have remaining steps to take.

For more information, visit: <https://www.ada.gov/resources/web-rule-first-steps/>

New Mexico Retiree Health Care Authority (CP)

Change in Market Value

For the Month of Mar 2026

(Report as of April 17, 2026)

Investment Name	Prior Ending Market Value	Contributions	Distributions	Fees	Income	Gains - Realized	Gains - Unrealized	Gains - Realized & Unrealized	Market Value
Core Bonds Pool	397,369,373.12	-	-	-	1,461,828.75	(237,917.21)	(9,500,125.69)	(9,738,042.90)	389,093,158.97
Credit Plus Pool	97,899,389.17	-	-	-	447,923.28	21,120.37	(1,697,532.98)	(1,676,412.61)	96,670,899.84
NM Retiree Health Care Authority Cash Account	-	-	-	-	-	-	-	-	-
Non-US Large Cap Active Pool	112,036,727.50	-	-	-	358,033.69	474,915.58	(12,325,838.48)	(11,850,922.90)	100,543,838.29
Non-US Large Cap Passive Pool	157,877,091.17	-	-	-	589,339.00	(15,675.15)	(16,481,511.95)	(16,497,187.10)	141,969,243.07
Non-US SMID Cap Active Pool	27,643,122.82	-	-	-	131,742.89	230,407.88	(3,366,808.21)	(3,136,400.33)	24,638,465.38
Non-US SMID Cap Passive Pool	42,864,221.29	-	-	-	162,627.89	68,288.43	(4,890,404.13)	(4,822,115.70)	38,204,733.48
Private Debt Market Pool	241,001,002.85	-	-	-	1,019,357.53	22,503.64	2,512,473.09	2,534,976.73	244,555,337.11
Private Equity Pool	224,970,608.56	-	-	-	156,001.02	543,318.89	4,288,036.96	4,831,355.85	229,957,965.43
Real Estate Pool	192,676,523.66	-	-	-	377,468.97	314,158.07	122,841.16	436,999.23	193,490,991.86
Real Return Pool	101,940,656.70	-	-	-	345,867.62	474,894.89	1,552,440.75	2,027,335.64	104,313,859.96
US Large Cap Index Pool	385,764,411.10	-	-	-	467,831.22	145,987.75	(19,789,977.78)	(19,643,990.03)	366,588,252.29
US SMID Cap Alternative Weighted Index Pool	64,719,764.90	-	-	-	139,849.46	703,334.94	(3,462,298.07)	(2,758,963.13)	62,100,651.23
Sub - Total New Mexico Retiree Health Care Auth	2,046,762,892.84	-	-	-	5,657,871.32	2,745,338.08	(63,038,705.33)	(60,293,367.25)	1,992,127,396.91
Total New Mexico Retiree Health Care Auth	2,046,762,892.84	-	-	-	5,657,871.32	2,745,338.08	(63,038,705.33)	(60,293,367.25)	1,992,127,396.91

FORM S-1 CERTIFICATION FY27 OPERATING BUDGET CERTIFICATION

Agency Name: Retiree Health Care Authority


Business Unit: 34300

I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the arithmetic accuracy of all numeric information has been verified.

- Yes, department level budgets will be used this fiscal year
- No, department level budgets will not be used this fiscal year

DocuSigned by:


OF18CCECEDEB44C...
 Neil Kueffer, Executive Director

Signed by:


5B814F01DA194CB...
 Dr. Lee Caruana, Board President

DocuSigned by:


E3BE5FA5B5AF416...
 Sheri Ayanniyi, CFO

6300 Jefferson St NE, Suite
 150
 Albuquerque, NM 87109

(505) 222-6406

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Note: Operating Budgets of agencies headed by a board or commission must be approved by the board or commission by official action and signed by the chairperson. Operating Budgets of other agencies must be signed by the director or secretary. Operating Budgets not properly signed will be returned.

BU **PCode** **Department**
 34300 0000 0000000000

S-8 OPBUD

(Dollars in Thousands)

		FY26 OPBUD	FY26 PCF Projection	FY27 GAA OPBUD with Transfers	FY27 Comp Package	FY27 Other Adjustments	FY27 OPBUD-3	FY27 Other Recurring	Final FY27 OPBUD
112	Other Transfers	4,427.0	0.0	4,656.6	25.5	0.0	4,682.1	0.0	4,682.1
130	Other Revenues	411,096.7	0.0	422,938.3	25.5	0.0	422,963.8	0.0	422,963.8
REVENUE, TRANSFERS		415,523.7	0.0	427,594.9	51.0	0.0	427,645.9	0.0	427,645.9
REVENUE		415,523.7	0.0	427,594.9	51.0	0.0	427,645.9	0.0	427,645.9
EXPENSE									
200	Personal services and employee benefits	3,053.5	3,137.2	3,243.0	25.5	0.0	3,268.5	0.0	3,268.5
300	Contractual services	407,385.0	0.0	418,999.9	0.0	0.0	418,999.9	0.0	418,999.9
400	Other	670.2	0.0	695.4	0.0	0.0	695.4	0.0	695.4
500	Other financing uses	4,415.0	0.0	4,656.6	25.5	0.0	4,682.1	0.0	4,682.1
EXPENDITURES		415,523.7	3,137.2	427,594.9	51.0	0.0	427,645.9	0.0	427,645.9
EXPENSE		415,523.7	3,137.2	427,594.9	51.0	0.0	427,645.9	0.0	427,645.9
FTE POSITIONS									
810	Permanent	28.00	28.00	28.00	0.00	0.00	28.00	0.00	28.00
FTEs		28.00	28.00	28.00	0.00	0.00	28.00	0.00	28.00
FTE POSITIONS		28.00	28.00	28.00	0.00	0.00	28.00	0.00	28.00

BU PCode
34300 P633

S-8 OPBUD by Fund Columns/Rows

(Dollars in Thousands)

REVENUE

Fund	FY27 OPBUD-3 General Fund	FY27 OPBUD-3 Other State	FY27 OPBUD-3 Interagency	FY27 OPBUD-3 Federal Fund	Total
38100	0.0	422,963.8	0.0	0.0	422,963.8
REVENUE TOTAL	0.0	422,963.8	0.0	0.0	422,963.8

EXPENSE

Fund	PS/EB	Contractual	Other	Other Financing Sources	Total
38100	0.0	418,236.7	45.0	4,682.1	422,963.8
EXPENSE TOTAL	0.0	418,236.7	45.0	4,682.1	422,963.8

Program Support

BU PCode
34300 P634

S-8 OPBUD by Fund Columns/Rows

(Dollars in Thousands)

REVENUE

Fund	FY27 OPBUD-3 General Fund	FY27 OPBUD-3 Other State	FY27 OPBUD-3 Interagency	FY27 OPBUD-3 Federal Fund	Total
38000	0.0	0.0	4,682.1	0.0	4,682.1
REVENUE TOTAL	0.0	0.0	4,682.1	0.0	4,682.1

EXPENSE

Fund	PS/EB	Contractual	Other	Other Financing Sources	Total
38000	3,268.5	763.2	650.4	0.0	4,682.1
EXPENSE TOTAL	3,268.5	763.2	650.4	0.0	4,682.1

Healthcare Benefits Administration

State of New Mexico

S-9 Account Code Expenditure Summary

BU PCode Department
34300 P633 000000

(Dollars in Thousands)

		FY26 OPBUD	FY27 PCF Projection	FY27 GAA OPBUD	FY27 Comp Package	FY27 Other Adjustments	FY27 OPBUD-3	FY27 Other Adjustments	Final FY27 OPBUD
535100	Medical Services	406,636.7	0.0	418,236.7	0.0	0.0	418,236.7	0.0	418,236.7
300	Contractual services	406,636.7	0.0	418,236.7	0.0	0.0	418,236.7	0.0	418,236.7
547900	Miscellaneous Expense	45.0	0.0	45.0	0.0	0.0	45.0	0.0	45.0
400	Other	45.0	0.0	45.0	0.0	0.0	45.0	0.0	45.0
555106	OFU - INTRA-Agency	4,415.0	0.0	4,656.6	25.5	0.0	4,682.1	0.0	4,682.1
500	Other financing uses	4,415.0	0.0	4,656.6	25.5	0.0	4,682.1	0.0	4,682.1
TOTAL EXPENSE		411,096.7	0.0	422,938.3	25.5	0.0	422,963.8	0.0	422,963.8

Program Support

State of New Mexico

S-9 Account Code Expenditure Summary

BU PCode Department
34300 P634 000000

(Dollars in Thousands)

		FY26 OPBUD	FY27 PCF Projection	FY27 GAA OPBUD	FY27 Comp Package	FY27 Other Adjustments	FY27 OPBUD-3	FY27 Other Adjustments	Final FY27 OPBUD
520000	Payroll	0.0	0.0	3,243.0	0.0	0.0	0.0	0.0	0.0
520100	Exempt Perm Positions P/T&F/T	527.4	545.3	0.0	3.8	0.0	551.8	0.0	551.8
520200	Term Positions	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520300	Classified Perm Positions F/T	1,685.9	1,654.3	0.0	12.8	0.0	1,733.1	0.0	1,733.1
520800	Annl & Comp Paid At Separation	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521100	Group Insurance Premium	191.0	338.6	0.0	2.9	0.0	311.4	0.0	311.4
521200	Retirement Contributions	427.9	419.2	0.0	4.0	0.0	439.3	0.0	439.3
521300	F I C A	169.2	135.1	0.0	1.6	0.0	174.7	0.0	174.7
521400	Workers' Comp Assessment Fee	0.3	0.0	0.0	0.0	0.0	0.3	0.0	0.3
521410	GSD Work Comp Insur Premium	1.7	0.0	0.0	0.0	0.0	1.4	0.0	1.4
521500	Unemployment Comp Premium	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.6
521600	Employee Liability Ins Premium	5.1	0.0	0.0	0.0	0.0	10.2	0.0	10.2
521700	RHC Act Contributions	45.0	44.7	0.0	0.4	0.0	45.7	0.0	45.7
200	Personal services and employee benef	3,053.5	3,137.2	3,243.0	25.5	0.0	3,268.5	0.0	3,268.5
530000	Contracts	0.0	0.0	763.2	0.0	0.0	0.0	0.0	0.0
535200	Professional Services	437.6	0.0	0.0	0.0	0.0	451.2	0.0	451.2
535300	Other Services	25.5	0.0	0.0	0.0	0.0	24.0	0.0	24.0
535309	Other Services - Interagency	30.3	0.0	0.0	0.0	0.0	33.0	0.0	33.0
535400	Audit Services	129.9	0.0	0.0	0.0	0.0	110.0	0.0	110.0

Program Support

State of New Mexico

S-9 Account Code Expenditure Summary

BU PCode Department
34300 P634 000000

(Dollars in Thousands)

		FY26 OPBUD	FY27 PCF Projection	FY27 GAA OPBUD	FY27 Comp Package	FY27 Other Adjustments	FY27 OPBUD-3	FY27 Other Adjustments	Final FY27 OPBUD
535500	Attorney Services	25.0	0.0	0.0	0.0	0.0	35.0	0.0	35.0
535600	IT Services	100.0	0.0	0.0	0.0	0.0	110.0	0.0	110.0
300	Contractual services	748.3	0.0	763.2	0.0	0.0	763.2	0.0	763.2
540000	Other Expenses	0.0	0.0	650.4	0.0	0.0	0.0	0.0	0.0
542100	Employee I/S Mileage & Fares	2.5	0.0	0.0	0.0	0.0	2.5	0.0	2.5
542200	Employee I/S Meals & Lodging	6.0	0.0	0.0	0.0	0.0	6.0	0.0	6.0
542300	Brd & Comm Mbr Meals & Lodging	5.5	0.0	0.0	0.0	0.0	5.5	0.0	5.5
542310	Brd & Comm Mbr Mileage & Fares	6.0	0.0	0.0	0.0	0.0	6.5	0.0	6.5
542500	Transp - Fuel & Oil	2.2	0.0	0.0	0.0	0.0	2.2	0.0	2.2
542600	Transp - Parts & Supplies	0.6	0.0	0.0	0.0	0.0	0.6	0.0	0.6
542700	Transp - Transp Insurance	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.2
542800	State Transp Pool Charges	8.1	0.0	0.0	0.0	0.0	9.2	0.0	9.2
543200	Maint - Furn, Fixt, Equipment	6.0	0.0	0.0	0.0	0.0	6.0	0.0	6.0
543300	Maint - Buildings & Structures	6.0	0.0	0.0	0.0	0.0	6.0	0.0	6.0
543400	Maint - Property Insurance	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.1
543830	IT HW/SW Agreements	24.0	0.0	0.0	0.0	0.0	30.0	0.0	30.0
544000	Supply Inventory IT	20.0	0.0	0.0	0.0	0.0	20.0	0.0	20.0
544100	Supplies-Office Supplies	13.0	0.0	0.0	0.0	0.0	11.0	0.0	11.0
544900	Supplies-Inventory Exempt	5.0	0.0	0.0	0.0	0.0	6.5	0.0	6.5
545600	Reporting & Recording	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.2
545700	ISD Services	21.5	0.0	0.0	0.0	0.0	23.7	0.0	23.7
545710	DOIT HCM Assessment Fees	9.8	0.0	0.0	0.0	0.0	10.5	0.0	10.5
545900	Printing & Photo Services	70.0	0.0	0.0	0.0	0.0	71.5	0.0	71.5
546100	Postage & Mail Services	90.0	0.0	0.0	0.0	0.0	90.0	0.0	90.0
546400	Rent Of Land & Buildings	134.7	0.0	0.0	0.0	0.0	140.5	0.0	140.5
546409	Rent Expense - Interagency	19.9	0.0	0.0	0.0	0.0	20.5	0.0	20.5
546500	Rent Of Equipment	37.1	0.0	0.0	0.0	0.0	37.0	0.0	37.0
546600	Communications	6.0	0.0	0.0	0.0	0.0	6.0	0.0	6.0
546610	DOIT Telecommunications	58.5	0.0	0.0	0.0	0.0	74.4	0.0	74.4
546700	Subscriptions/Dues/License Fee	7.0	0.0	0.0	0.0	0.0	6.0	0.0	6.0
546709	Subscription & Due Interagency	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.2
546800	Employee Training & Education	9.0	0.0	0.0	0.0	0.0	9.0	0.0	9.0
546810	Board Member Training	5.5	0.0	0.0	0.0	0.0	5.5	0.0	5.5

Program Support

State of New Mexico

S-9 Account Code Expenditure Summary

BU PCode Department
34300 P634 000000

(Dollars in Thousands)

		FY26 OPBUD	FY27 PCF Projection	FY27 GAA OPBUD	FY27 Comp Package	FY27 Other Adjustments	FY27 OPBUD-3	FY27 Other Adjustments	Final FY27 OPBUD
546900	Advertising	1.8	0.0	0.0	0.0	0.0	1.8	0.0	1.8
547730	Lease Principal Payment	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
547900	Miscellaneous Expense	2.3	0.0	0.0	0.0	0.0	2.3	0.0	2.3
548300	Information Tech Equipment	27.5	0.0	0.0	0.0	0.0	20.0	0.0	20.0
548882	Lease Interest	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
549600	Employee O/S Mileage & Fares	6.0	0.0	0.0	0.0	0.0	6.0	0.0	6.0
549700	Employee O/S Meals & Lodging	6.5	0.0	0.0	0.0	0.0	6.5	0.0	6.5
549800	Brd & Comm O/S Mileage & Fares	3.5	0.0	0.0	0.0	0.0	3.5	0.0	3.5
549900	Brd & Comm O/S Meals & Lodging	3.0	0.0	0.0	0.0	0.0	3.0	0.0	3.0
400	Other	625.2	0.0	650.4	0.0	0.0	650.4	0.0	650.4
555106	OFU - INTRA-Agency	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
500	Other financing uses	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TOTAL EXPENSE		4,427.0	3,137.2	4,656.6	25.5	0.0	4,682.1	0.0	4,682.1

State of New Mexico

S-13 OPBUD

(Dollars in Thousands)

Line Item by PCode

			-----FY 2027-----								
BusUnit	Line Item		2024-25	2025-26	Request		Recommendation		FY 2027		
			Actuals	OpBud	Base	Expansion	Base	Expansion	Opbud		
34300	P633	Healthcare Benefits Administrat	402101	Withholding Taxes	47,506.36	0	64,996.9	0	64,996.9	0.0	64,996.9
			422001	Rebates	4.03	0	0	0	0	0.0	0.0
			441201	Interest On Investments	2,727.86	0	1,000	0	1,000	0.0	689.0
			441401	Interest On Loans	43.43	0	0	0	0	0.0	0.0
			441851	Unrealized Gain (Loss) on Invs	151,505.72	0	0	0	0	0.0	0.0
			462000	Legal Settlements	54.61	0	0	0	0	0.0	0.0
			471508	Employer Contr-Retiree Ins	203,860.43	0	148,451	0	148,451	0.0	148,476.5
			471608	Retiree Contr.-Retiree Ins.	168,905.04	0	168,801.4	0	168,801.4	0.0	168,801.4
			496901	Miscellaneous Revenue	25.29	0	0	0	0	0.0	0.0
			496903	Miscellaneous Revenue	49,330.08	0	40,000	0	40,000	0.0	40,000.0
			535100	Medical Services	353,987.57	0	418,236.7	0	418,236.7	0.0	418,236.7
			547900	Miscellaneous Expense	39.8	0	45	0	45	0.0	45.0
			555106	OFU - INTRA-Agency	4,125.2	0	4,967.6	0	4,967.6	0.0	4,682.1
Subtotals for 34300 P633 Healthcare Benefits Administratio			Revenue	623,962.8	0.0	423,249.3	0.0	423,249.3	0.0	422,963.8	
			Expenditures	358,152.6	0.0	423,249.3	0.0	423,249.3	0.0	422,963.8	
34300	P634	Program Support	441201	Interest On Investments	87.37	0	0	0	0	0.0	0.0
			499880	O/F Sources - Lease Financing	84.36	0	0	0	0	0.0	0.0
			499906	OFS - INTRA-Agency	4,125.2	0	4,967.6	0	4,967.6	0.0	4,682.1
			520100	Exempt Perm Positions P/T&F/T	507.12	0	538.6	0	538.6	0.0	551.8
			520200	Term Positions	2.52	0	0	0	0	0.0	0.0
			520300	Classified Perm Positions F/T	1,336.11	0	1,923.6	0	1,923.6	0.0	1,733.1
			520800	Annl & Comp Paid At Separation	26.62	0	0	0	0	0.0	0.0
			521100	Group Insurance Premium	164.94	0	311.7	0	311.7	0.0	311.4
			521200	Retirement Contributions	354.92	0	473.7	0	473.7	0.0	439.3
			521300	F I C A	137.17	0	188.4	0	188.4	0.0	174.7
			521400	Workers' Comp Assessment Fee	0.23	0	0.3	0	0.3	0.0	0.3
			521410	GSD Work Comp Insur Premium	1.21	0	1.4	0	1.4	0.0	1.4
			521500	Unemployment Comp Premium	0	0	0.6	0	0.6	0.0	0.6
			521600	Employee Liability Ins Premium	2.85	0	10.2	0	10.2	0.0	10.2
			521700	RHC Act Contributions	36.89	0	49.2	0	49.2	0.0	45.7
			535200	Professional Services	421.46	0	487.5	0	487.5	0.0	451.2

State of New Mexico

S-13 OPBUD

(Dollars in Thousands)

Line Item by PCode

BusUnit	Line Item	2024-25 Actuals	2025-26 OpBud	-----FY 2027-----				FY 2027 Opbud
				Request		Recommendation		
				Base	Expansion	Base	Expansion	
	535300 Other Services	9.99	0	24	0	24	0.0	24.0
	535309 Other Services - Interagency	25.5	0	32.9	0	32.9	0.0	33.0
	535400 Audit Services	101.97	0	130.9	0	130.9	0.0	110.0
	535500 Attorney Services	7.39	0	25	0	25	0.0	35.0
	535600 IT Services	110.88	0	115	0	115	0.0	110.0
	542100 Employee I/S Mileage & Fares	1.92	0	2.5	0	2.5	0.0	2.5
	542200 Employee I/S Meals & Lodging	5.58	0	6	0	6	0.0	6.0
	542300 Brd & Comm Mbr Meals & Lodgin	4.76	0	5.5	0	5.5	0.0	5.5
	542310 Brd & Comm Mbr Mileage & Fares	4.4	0	6	0	6	0.0	6.5
	542500 Transp - Fuel & Oil	0.58	0	2.2	0	2.2	0.0	2.2
	542600 Transp - Parts & Supplies	0	0	0.6	0	0.6	0.0	0.6
	542700 Transp - Transp Insurance	0	0	0.2	0	0.2	0.0	0.2
	542800 State Transp Pool Charges	5.88	0	8.5	0	8.5	0.0	9.2
	543200 Maint - Furn, Fixt, Equipment	5.88	0	9	0	9	0.0	6.0
	543300 Maint - Buildings & Structures	0	0	6	0	6	0.0	6.0
	543400 Maint - Property Insurance	0	0	0.1	0	0.1	0.0	0.1
	543830 IT HW/SW Agreements	38.8	0	24	0	24	0.0	30.0
	544000 Supply Inventory IT	29.28	0	20	0	20	0.0	20.0
	544100 Supplies-Office Supplies	6.3	0	11	0	11	0.0	11.0
	544900 Supplies-Inventory Exempt	5.21	0	7	0	7	0.0	6.5
	545600 Reporting & Recording	0	0	0.2	0	0.2	0.0	0.2
	545700 ISD Services	14.02	0	23.8	0	23.8	0.0	23.7
	545710 DOIT HCM Assessment Fees	9.18	0	10.5	0	10.5	0.0	10.5
	545900 Printing & Photo Services	67.24	0	75	0	75	0.0	71.5
	546100 Postage & Mail Services	88.35	0	90	0	90	0.0	90.0
	546400 Rent Of Land & Buildings	4.45	0	139	0	139	0.0	140.5
	546409 Rent Expense - Interagency	19.3	0	20.5	0	20.5	0.0	20.5
	546500 Rent Of Equipment	9.61	0	37.1	0	37.1	0.0	37.0
	546600 Communications	2.54	0	4	0	4	0.0	6.0
	546610 DOIT Telecommunications	66.76	0	74.4	0	74.4	0.0	74.4
	546700 Subscriptions/Dues/License Fee	4.09	0	6	0	6	0.0	6.0

State of New Mexico

S-13 OPBUD

(Dollars in Thousands)

Line Item by PCode

BusUnit	Line Item	2024-25 Actuals	2025-26 OpBud	-----FY 2027-----				FY 2027 Opbud			
				Request		Recommendation					
				Base	Expansion	Base	Expansion				
	546709	Subscription & Due Interagency	0.13	0	0.2	0	0.2	0.0	0.2		
	546800	Employee Training & Education	5.34	0	8	0	8	0.0	9.0		
	546810	Board Member Training	0	0	5.5	0	5.5	0.0	5.5		
	546900	Advertising	0.12	0	1.8	0	1.8	0.0	1.8		
	547730	Lease Principal Payment	137.7	0	0	0	0	0.0	0.0		
	547900	Miscellaneous Expense	1.38	0	2.5	0	2.5	0.0	2.3		
	548300	Information Tech Equipment	25.47	0	27.5	0	27.5	0.0	20.0		
	548882	Lease Interest	6.82	0	0	0	0	0.0	0.0		
	549600	Employee O/S Mileage & Fares	5.12	0	6	0	6	0.0	6.0		
	549700	Employee O/S Meals & Lodging	8.92	0	7.5	0	7.5	0.0	6.5		
	549800	Brd & Comm O/S Mileage & Fares	0	0	3.5	0	3.5	0.0	3.5		
	549900	Brd & Comm O/S Meals & Lodgin	0	0	3	0	3	0.0	3.0		
Subtotals for	34300	P634	Program Support	Revenue	4,296.9	0.0	4,967.6	0.0	4,967.6	0.0	4,682.1
				Expenditures	3,832.9	0.0	4,967.6	0.0	4,967.6	0.0	4,682.1

State of New Mexico
R-2 Transfers Opbud DFA (7400)
(Dollars in Thousands)

Providing PCode	Providing Fund	Providing Account	Receiving PCode	Receiving Fund	Receiving Account	2025-26 Agency Budget	2026-27 GAA OPBUD Transfers	FY27 Account Transfers	2026-27 Final OPBUD with Transfers	2026-27 Comp Package	2026-27 Other Adjust	2026-27 Final Approp to SHARE	2026-27 Recurring Adjust	2026-27 Final OPBUD
P633	38100	555106	P634	38000	499906	0	4,656.6	0	4,656.6	0	0	4,656.6	0	4,656.6

Program Support

BU PCode Department
34300 P634 000000

State of New Mexico
FTE by PCode OPBUD
(Dollars in Thousands)

Account	Account Name	Fund	2025-26 Opbud FTE	2026-27 PCF Projection	Final FY27 OPBUD	Justification
810	Permanent	38000	28.00	28.00	28.00	
Permanent Subtotal			28.00	28.00	28.00	
Total FTEs			28.00	28.00	28.00	

Business Unit (Agency) 34300	Class Code K0000
Date 7/1/2026	Budget Reference 127

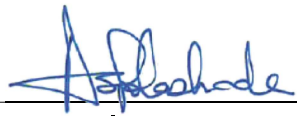
State of New Mexico
Operating Budget Input Report
OPBUD-3

Agency Name Retiree Health Care Authority

Fund	BU	PCode/Dept	Account	Source of Funds or Expenditure Category	Amounts
REVENUE (Budgeted Sources)					
Other Revenues					
SHARE Revenue Budget Journal				34327OPR01	
38100	34300	P633	402101	Withholding Taxes	64,996,900
38100	34300	P633	441201	Interest On Investments	689,000
38100	34300	P633	471508	Employer Contr-Retiree Ins	148,476,500
38100	34300	P633	471608	Retiree Contr.-Retiree Ins.	168,801,400
38100	34300	P633	496903	Miscellaneous Revenue	40,000,000
Subtotal of Other Revenues					422,963,800
TOTAL REVENUE					422,963,800

APPROPRIATION (Budgeted Expenditures)					
SHARE Appropriation Budget Journal				34327OPA01	
38100	34300	P633	300	Contractual services	418,236,700
38100	34300	P633	400	Other	45,000
38100	34300	P633	500	Other financing uses	4,682,100
TOTAL APPROPRIATIONS					422,963,800

For DFA Use Only	
Control Number	_____
SBD Analyst	_____
SBD Director	_____
Posted	_____

Signature:  _____
Chief Financial Officer

Business Unit (Agency) 34300	Class Code K0000
Date 7/1/2026	Budget Reference 127

State of New Mexico
Operating Budget Input Report
OPBUD-3

Agency Name Retiree Health Care Authority

State of New Mexico
Operating Budget Input Report
OPBUD-3

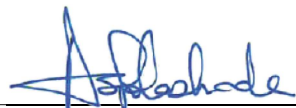
Business Unit (Agency) 34300	Class Code K0000
Date 7/1/2026	Budget Reference 127

Agency Name Retiree Health Care Authority

Fund	BU	PCode/Dept	Account	Source of Funds or Expenditure Category	Amounts
REVENUE (Budgeted Sources)					
Other Transfers					
SHARE Revenue Budget Journal				34327OPR01	
38000	34300	P634	499906	OFS - INTRA-Agency	4,682,100
Subtotal of Other Transfers					4,682,100
TOTAL REVENUE					4,682,100

APPROPRIATION (Budgeted Expenditures)					
SHARE Appropriation Budget Journal				34327OPA01	
38000	34300	P634	200	Personal services and employee benefits	3,268,500
38000	34300	P634	300	Contractual services	763,200
38000	34300	P634	400	Other	650,400
TOTAL APPROPRIATIONS					4,682,100

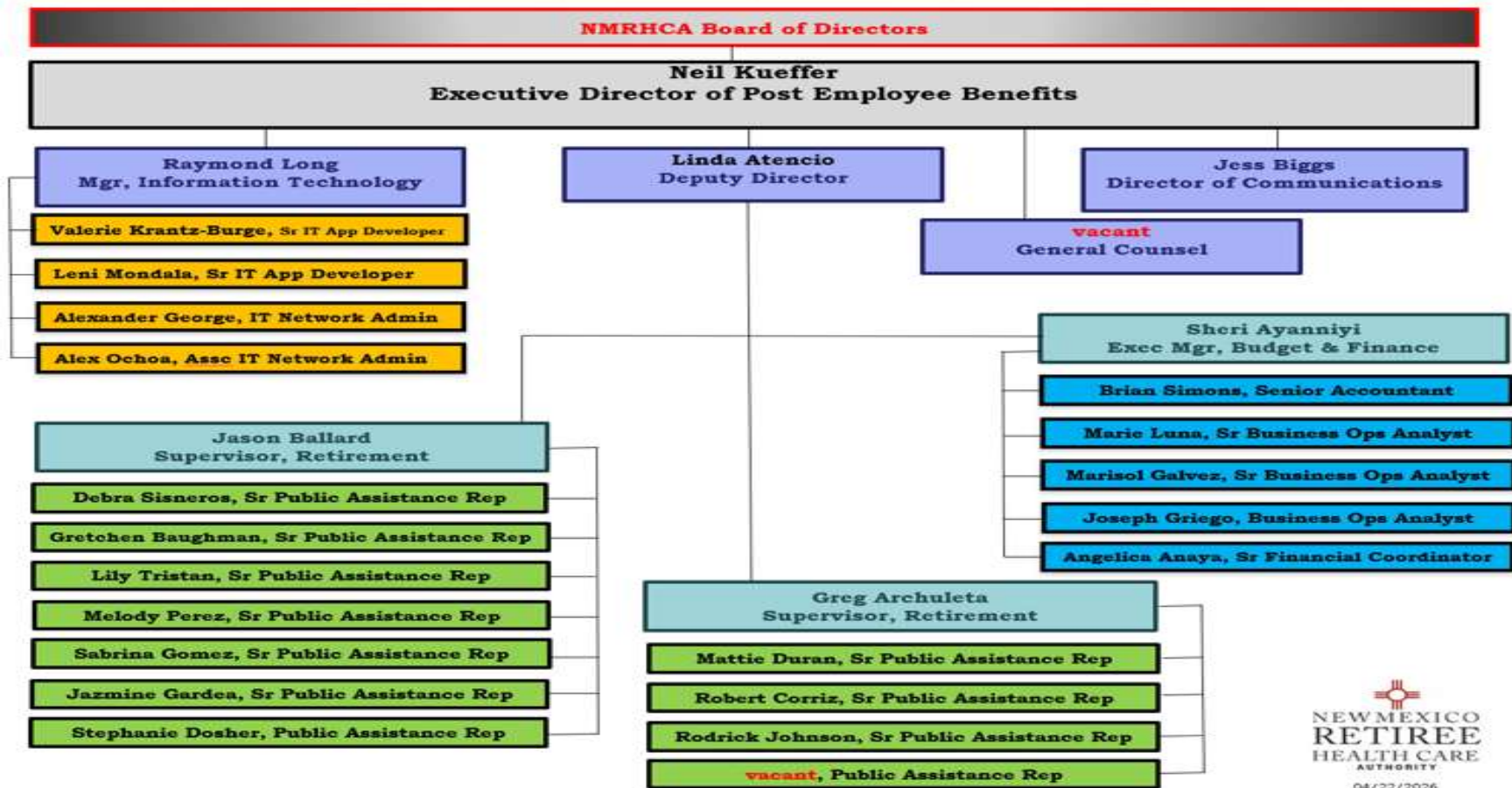
For DFA Use Only
Control Number _____
SBD Analyst _____
SBD Director _____
Posted _____

Signature:  _____
Chief Financial Officer

Agency Name: NM Retiree Health Care Authority
 Program Name: Program Support

Business Unit: 34300
 Program Code: P634

FY27 OPERATING BUDGET ORGANIZATION CHART FORM S-2



New Mexico Retiree Health Care Authority

Fiscal Year 2026 Third Quarter Budget Review

Healthcare Benefits Fund

Between July 1, 2025, and March 31, 2026, the Healthcare Benefits Administration Program expended \$276.9 million and collected \$380.2 million in revenue. The resulting \$103.3 million surplus is higher than the \$85 million surplus for the same period in FY25.

Third quarter FY26 expenditure is \$12.7 million higher than expenditure in third quarter FY25, for an increase of 4.8%. Current projections indicate a \$152.8 million surplus at the end of FY26.

Major Upward Cost Pressures:

1. Premium rate increases for United HealthCare of 42% and Humana of 76% on the MAPD plans effective January 1, 2026, were driving increases in expenditures for these plans.
2. Premium rate increases for pre-Medicare Value and Premier Plans of 2% for retirees and spouses and 3% for child(ren) effective January 1, 2026, were driving increases in expenditures for these plans.
3. The cost of claims for our self-insured pharmacy benefits increased during the third quarter of this year compared to prior year, even though enrollment has declined.

Major Downward Cost Pressures:

1. Pre-Medicare Plan Participation
 - Premier Plans: -607 members (-8.1%)
 - Value Plans: -203 members (-7.0%)
 - Net: -810 members (-7.8%)
2. Medicare Plan Participation
 - Medicare Supplement: -634 members (-3.2%)
 - *BCBS MA Plans: +1,163 members (22.3%)
 - Humana MA Plans: -242 members (-12.4%)
 - Presbyterian MA Plans: -116 members (-1.3%)
 - UnitedHealthcare MA Plans: -490 members (-10.0%)
3. Overall plan participation (medical and voluntary coverages) declined by 0.6% (386 members) between March 2025 and March 2026, compared to a 0.7% decline during the previous fiscal year when the plan saw a loss of 430 members.
4. A 5.7% decrease in dependent child participation in medical plans from 980 in March 2025 to 924 in March 2026.

*Default Plans --- All PHP and BCBS Pre-Medicare Plan Participants to BCBS MAPD PPO Plan effective January 1, 2025.

Below is an annual summary of the cash contributions made to the State Investment Council (SIC) between fiscal years 2016 – 2025, as well as monthly contribution(s) made in FY26:

Ten-Year Summary of Cash Contributions to Long Term Investments - SIC	
FY16 Total	\$ 35,000,000
FY17 Total	\$ 33,000,000
FY18 Total	\$ 20,000,000
FY19 Total	\$ 45,000,000
FY20 Total	\$ 56,000,000
FY21 Total	\$ 75,000,000
FY22 Total	\$ 60,000,000
FY23 Total	\$ 100,000,000
FY24 Total	\$ 140,000,000
FY25 Total	\$ 140,000,000
Transfer Effective	Amount Transferred
November 1, 2025	\$ 30,000,000
February 1, 2026	\$ 40,000,000
FY26 Total	\$ 70,000,000
Total Transfers	\$ 774,000,000

New Mexico Retiree Health Care Authority

FY26 3rd Quarter Budget Review

Comparison of Projected vs. Actual

(in thousands)

Healthcare Benefit Fund

FY26/FY25 Comparison

	FY26 Approved Q3 Budget	FY26 Q3 Actual	FY25 Q3 Actual	Dollar Change	Percent Change
Sources:					
Employer/Employee Contributions	\$ 105,827.3	\$ 157,662.2	\$ 149,642.5	\$ 8,019.7	5.4%
Retiree Contributions	\$ 129,676.1	\$ 138,650.4	\$ 131,211.3	\$ 7,439.1	5.7%
Taxation & Revenue Fund	\$ 43,524.7	\$ 33,859.1	\$ 30,231.3	\$ 3,627.8	12.0%
Other Miscellaneous Revenue	\$ 29,239.8	\$ 48,669.6	\$ 36,516.2	\$ 12,153.4	33.3%
Interest Income	\$ 75.0	\$ 1,538.1	\$ 1,926.7	\$ (388.6)	-20.2%
Refunds	\$ -	\$ (190.7)	\$ (269.7)	\$ 79.0	-29.3%
Total Sources	\$ 308,342.8	\$ 380,188.7	\$ 349,258.4	\$ 30,930.3	8.9%
Uses:					
Medical Contractual Services	\$ 304,977.5	\$ 272,462.2	\$ 260,044.4	\$ 12,417.8	4.8%
ACA Fees (PCORI)	\$ 45.0	\$ 38.6	\$ 39.8	\$ (1.2)	-3.0%
Other Financing Uses	\$ 3,320.3	\$ 4,427.0	\$ 4,125.2	\$ 301.8	7.3%
Total Uses	\$ 308,342.8	\$ 276,889.2	\$ 264,169.6	\$ 12,718.4	4.8%
Sources Over Uses	NA	\$ 103,299.5	\$ 85,088.8	NA	NA

FY26 Budget Compared to Actual

	FY26 Approved Budget	FY26 Actuals	Remaing Balance	Percent Expended/ Collected	FY26 Projected Total
Sources:					
Employer/Employee Contributions	\$ 141,103.0	\$ 157,662.2	\$ (16,559.2)	111.7%	\$ 210,200.0
Retiree Contributions	\$ 172,901.4	\$ 138,650.4	\$ 34,251.0	80.2%	\$ 184,900.0
Taxation & Revenue Fund	\$ 58,032.9	\$ 33,859.1	\$ 24,173.8	58.3%	\$ 58,044.1
Other Miscellaneous Revenue	\$ 38,971.4	\$ 48,669.6	\$ (9,698.2)	124.9%	\$ 65,000.0
Interest Income	\$ 100.0	\$ 1,538.1	\$ (1,438.1)	NA	\$ 2,050.8
Refunds	\$ -	\$ (190.7)	\$ -	NA	\$ (254.3)
Total Sources	\$ 411,108.7	\$ 380,188.7	\$ 30,729.3	92.5%	\$ 519,940.6
Uses:					
Medical Contractual Services	\$ 406,636.7	\$ 272,423.6	\$ 134,213.1	67.0%	\$ 362,800.0
ACA Fees (PCORI)	\$ 45.0	\$ 38.6	\$ 6.4	85.8%	\$ 38.6
Other Financing Uses	\$ 4,427.0	\$ 4,427.0	\$ -	100.0%	\$ 4,315.2
Total Uses	\$ 411,108.7	\$ 276,889.2	\$ 134,219.5	67.4%	\$ 367,153.8
Sources Over Uses	NA	\$ 103,299.5	NA	NA	\$ 152,786.9

New Mexico Retiree Health Care Authority
3rd Quarter Healthcare Benefit Fund Detail
Fiscal Year 2026
(in thousands)

	FY26 Q3 Actuals	FY25 Q3 Actuals	FY26 - FY25 Difference
REVENUE:			
Employer/Employee Contributions	\$ 157,662.2	\$ 149,642.5	\$ 8,019.7
Retiree Contributions	\$ 138,650.4	\$ 131,211.3	\$ 7,439.1
Taxation and Revenue Suspense Fund	\$ 33,859.1	\$ 30,231.3	\$ 3,627.8
Other Miscellaneous Revenue	\$ 48,669.6	\$ 36,516.2	\$ 12,153.4
Interest Income	\$ 1,538.1	\$ 1,926.7	\$ (388.6)
Refunds	\$ (190.7)	\$ (269.7)	\$ 79.0
TOTAL REVENUE:	\$ 380,188.7	\$ 349,258.4	\$ 30,930.3
EXPENDITURES:			
Prescriptions			
Express Scripts	\$ 98,017.1	\$ 88,499.4	\$ 9,517.7
Total Prescriptions	\$ 98,017.1	\$ 88,499.4	\$ 9,517.7
Non-Medicare			
Blue Cross Blue Shield	\$ 40,517.2	\$ 46,786.1	\$ (6,268.9)
BCBS Administrative Costs	\$ 1,742.7	\$ 1,258.1	\$ 484.6
Presbyterian	\$ 33,317.0	\$ 32,564.3	\$ 752.7
Presbyterian Administrative Costs	\$ 1,245.7	\$ 1,363.2	\$ (117.5)
PCORI Fee	\$ 38.6	\$ 39.8	\$ (1.2)
Total Non-Medicare	\$ 76,861.2	\$ 82,011.5	\$ (5,150.3)
Medicare			
Blue Cross Blue Shield	\$ 38,057.7	\$ 35,045.7	\$ 3,012.0
BCBS Administrative Costs	\$ 2,999.7	\$ 3,437.3	\$ (437.6)
Presbyterian MA	\$ 15,523.0	\$ 14,835.5	\$ 687.5
UnitedHealthcare MA	\$ 6,760.3	\$ 4,705.0	\$ 2,055.3
Humana MA	\$ 1,516.7	\$ 915.5	\$ 601.2
BCBS MA	\$ 1,039.4	\$ 241.7	\$ 797.7
Total Medicare	\$ 65,896.8	\$ 59,180.8	\$ 6,716.0
Other Benefits			
BCBS Dental	\$ 759.1	\$ 204.7	\$ 554.4
Davis Vision	\$ 2,017.3	\$ 1,929.4	\$ 87.9
Delta Dental	\$ 18,526.0	\$ 17,899.2	\$ 626.8
Standard Life Insurance	\$ 10,384.7	\$ 10,359.3	\$ 25.4
Total Other Benefits	\$ 31,687.1	\$ 30,392.6	\$ 1,294.5
Other Expenses			
Program Support	\$ 4,427.0	\$ 4,125.2	\$ 301.8
Total Other Expenses	\$ 4,427.0	\$ 4,125.2	\$ 301.8
TOTAL EXPENDITURES:	\$ 276,889.2	\$ 264,209.5	\$ 12,679.8
Total Revenue over Total Expenditures	\$ 103,299.5	\$ 85,049.0	\$ 18,250.5

New Mexico Retiree Health Care Authority					
FY26 3rd QTR Budget Review					
Comparison of Budget vs. Actual					
(in thousands)					
Program Support					
FY26/FY25 Comparison					
	FY26 Approved Q3 Budget	FY26 Actuals	FY25 Actuals	Dollar Change	Percent Change
Sources:					
Other Transfers	\$ 3,365.7	\$ 4,487.6	\$ 4,125.2	\$ 362.4	8.8%
Total Sources	\$ 3,365.7	\$ 4,487.6	\$ 4,125.2	\$ 362.4	8.8%
Uses:					
Personal Services and Benefits	\$ 2,335.6	\$ 2,132.5	\$ 1,911.9	\$ 220.6	11.5%
Contractual Services	\$ 561.2	\$ 374.8	\$ 347.5	\$ 27.3	7.8%
Other Costs	\$ 468.9	\$ 447.1	\$ 403.2	\$ 43.9	10.9%
Total Uses	\$ 3,365.7	\$ 2,954.4	\$ 2,662.6	\$ 291.8	11.0%

New Mexico Retiree Health Care Authority					
FY26 3rd QTR Budget Review					
Comparison of Budget vs. Actual					
(in thousands)					
Program Support					
FY26 Budget Compared to Actual					
	Approved Operating Budget	FY26 Actuals	Remaining Balance	Percent Expended	FY26 Projected
Sources:					
Other Transfers	\$ 4,487.6	\$ 3,365.7	\$ 1,121.9	75%	\$ 4,315.2
Total Sources	\$ 4,487.6	\$ 3,365.7	\$ 1,121.9	75%	\$ 4,315.2
Uses:					
Personal Services and Benefits	\$ 3,114.1	\$ 2,132.5	\$ 981.6	68%	\$ 2,959.4
Contractual Services	\$ 748.3	\$ 374.8	\$ 373.5	50%	\$ 745.6
Other Costs	\$ 625.2	\$ 447.1	\$ 178.1	72%	\$ 610.2
Total Uses	\$ 4,487.6	\$ 2,954.4	\$ 1,533.2	66%	\$ 4,315.2

Program Support

Expenditure Summary (in thousands)

		A	B	C	D	E
Acct #	Account Description	Approved Budget	Expended Budget	Remaining Balance	Projected	Balance
200	Personal Services/ Employee Benefits	3,114.1	2,132.5	991.0	826.9	154.7
300	Contractual Services	748.3	374.8	373.5	370.8	2.7
400	Other Costs	625.2	447.1	178.1	163.1	15.0
	TOTAL	4,487.6	2,954.4	1,542.6	1,360.8	172.4

Expenditure Detail (in thousands)

Personal Services / Employee Benefits						
Acct #	Account Description	Approved Budget	Expended Budget	Remaining Balance	Projected	Balance
520100	Exempt Positions	527.4	325.5	201.9	135.8	66.1
520300	Classified Perm. Positions	1,685.9	1,151.9	534.0	440.0	94.0
520700	Overtime & Other Premium Pay	0.0	9.4			(9.4)
520800	Annual, Sick & Comp Paid	0.0	0.9	(0.9)	0.0	(0.9)
521100	Group Insurance Premium	251.6	211.7	39.9	84.7	(44.8)
521200	Retirement Contributions	427.9	286.1	141.8	110.8	31.0
521300	FICA	169.2	110.3	58.9	44.0	14.9
521400	Workers Comp	0.3	0.2	0.1	0.1	0.0
521410	GSD Work Comp Ins	1.7	1.7	0.0	0.0	0.0
521500	Unemployment Comp	0.0	0.0	0.0	0.0	0.0
521600	Employee Liability Insurance	5.1	5.1	0.0	0.0	0.0
521700	Retiree Health Care	45.0	29.7	15.3	11.5	3.8
	TOTAL	3,114.1	2,132.5	991.0	826.9	154.7
Contractual Services						
Acct #	Account Description					
535200	Professional Services	437.5	266.7	170.8	165.8	5.0
535209	Professional Services - Interagency	0.0	0.0	0.0	36.0	(36.0)
535300	Other Services	25.5	7.1	18.4	5.1	13.3
535309	Other Services InterA	30.4	0.0	30.4	31.6	(1.2)
535400	Audit Services	129.9	54.4	75.5	30.7	44.8
535500	Attorney Services	25.0	9.5	15.5	45.5	(30.0)
535600	Information Technology Services	100.0	37.2	62.8	56.1	6.7
	TOTAL	748.3	374.8	373.5	370.8	2.7
Other Costs						
Acct #	Account Description					
542100	Employee In-State Mileage & Fares	2.5	0.9	1.6	0.7	0.9
542200	Employee In-State Meals & Lodging	6.0	3.9	2.1	1.0	1.1
542300	Board & Commission - In-State Meals & Lodging	5.5	5.0	0.5	0.7	(0.2)
542310	Board & Commission - In-State Mileage & Fares	6.0	5.0	1.0	2.0	(1.0)
542500	Transportation-Fuel & Oil	2.2	0.4	1.8	0.5	1.3
542600	Transportation	0.6	1.1	(0.5)	0.5	(1.0)
542700	Transportation - Insurance	0.2	0.0	0.2	0.2	0.0
542800	State Transportation Pool Charges	8.1	7.9	0.2	0.0	0.2
543200	Maintenance - Furniture, Fixtures & Equipment	6.0	0.0	6.0	6.0	0.0
543300	Maintenance - Building & Structure	6.0	0.0	6.0	0.0	6.0
543400	Maintenance - Property Insurance	0.1	0.0	0.1	0.1	0.0
543830	IT HW/SW Agreements	24.0	23.8	0.2	0.0	0.2
544000	Supply Inventory IT	20.0	14.5	5.5	10.3	(4.8)
544100	Supplies - Office Supplies	13.0	4.8	8.2	7.0	1.2
544200	Supplies - Medical, Lab, Personal	0.0	0.2	(0.2)	0.0	(0.2)
544900	Supplies - Inventory Exempt	5.0	0.3	4.7	0.0	4.7
545600	Rep/Recording	0.2	0.0	0.2	0.0	0.2
545700	DoIT - ISD Services	21.5	13.8	7.7	6.5	1.2
545701	DoIT - HCM Fees	9.8	9.8	0.0	0.0	0.0
545900	Printing & Photo. Services	70.0	62.9	7.1	7.1	0.0
546100	Postage & Mail Services	90.0	85.0	5.0	5.0	(0.0)
546400	Rent of Land & Buildings	134.7	100.7	34.0	34.0	(0.0)
546409	Rent - Interagency	19.9	14.9	5.0	5.0	0.0
546500	Rent of Equipment	37.1	24.8	12.3	12.3	0.0
546600	Communications	6.0	2.5	3.5	1.1	2.4
546610	DOIT Telecomm	58.5	51.5	7.0	23.4	(16.4)
546700	Subscriptions & Dues	7.0	3.2	3.9	2.5	1.4
546709	Subscriptions & Dues - Interagency	0.2	0.1	0.1	0.0	0.1
546800	Employee Training & Education	9.0	5.3	3.7	1.7	2.0
546801	Board Member Training	5.5	0.0	5.5	0.0	5.5
546900	Advertising	1.8	0.0	1.8	0.0	1.8
547900	Miscellaneous Expense	2.3	0.9	1.4	0.8	0.6
547999	Request to Pay Prior Year	0.0	0.0	0.0	0.0	0.0
548300	Information Technology Equipment	27.5	0.0	27.5	27.5	0.0
549600	Employee Out-Of-State Mileage & Fares	6.0	1.3	4.7	3.5	1.2
549700	Employee Out-Of-State Meals & Lodging	6.5	2.8	3.7	3.7	0.0
549800	B&C-Out-Of-State Mileage & Fares	3.5	0.0	3.5	0.0	3.5
549900	B&C- Out-Of-State Meals & Lodging	3.0	0.0	3.0	0.0	3.0
	TOTAL	625.2	447.1	178.1	163.1	15.0

DRAFT

NEW MEXICO RETIREE HEALTH CARE AUTHORITY

REQUEST FOR PROPOSALS (RFP)

**LEGISLATIVE CONSULTING, GOVERNMENT
RELATIONS, AND LOBBYING SERVICES**



RFP#

27-343-0380-000XX

RFP Release Date: TBD

Proposal Due Date: TBD

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DRAFT

I. INTRODUCTION

A. PURPOSE OF THIS REQUEST FOR PROPOSALS

The purpose for this Request for Proposal (RFP) is to solicit sealed proposals through a competitive procurement process to establish a professional services contract for Legislative Consulting, Government Relations, and Lobbying Services on behalf of the New Mexico Retiree Health Care Authority.

B. BACKGROUND INFORMATION

The New Mexico Retiree Health Care Authority (NMRHCA) is a public entity established under the Retiree Health Care Act, in 1990. The Act was created to provide comprehensive insurance programs for eligible retirees and their dependents from participating public sector employers in New Mexico. NMRHCA offers medical, prescription drug, dental, vision, and life insurance coverage to approximately 65,000 members across the Medicare, Non-Medicare, and Voluntary plans.

NMRHCA is staffed by twenty-eight (28) full-time employees and governed by a 12-member Board of Directors, with two offices located in Albuquerque and Santa Fe. This Board consists of representatives from participating entities, retirees, active employees, and one member appointed by the Governor. The NMRHCA Board of Directors, along with the Legislature's allocation of governmental revenue on a "pay-as-you-go" basis, determines the financing for the program, primarily through setting premiums for retirees.

C. SCOPE OF PROCUREMENT

NMRHCA is issuing this RFP to procure professional services on an "as needed/if needed" basis to support the Authority in meeting its legislative, regulatory, and governmental affairs obligations. Refer to the "Detailed Scope of Work" section for a complete overview of the services being requested.

NMRHCA seeks a qualified contractor to provide legislative consulting, government relations, strategic legislative analysis, and lobbying services related to health care, public employee retiree benefits, appropriations, pharmacy policy, retiree health care funding, and other legislative or regulatory matters impacting NMRHCA. The successful offeror will work closely with the Board of Directors, Executive Director, and agency staff to support matters affecting NMRHCA before the New Mexico Legislature, interim and standing legislative committees, and the Governor's Office, including activities associated with regular 30-day sessions, 60-day sessions, and any special legislative sessions, as applicable.

In providing such services, Contractor shall register under the Lobbyist Regulation Act, NMSA 1978, Sections 2-11-1 to 2-11-9, as amended, and comply with all other applicable terms of such Act.

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

D. PROCUREMENT MANAGER

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

Name: Marisol Galvez, Procurement Manager
Address: NMRHCA
6300 Jefferson NE, Suite 150
Albuquerque, NM 87109

Telephone: (505) 222-6422
Email: Marisol.Galvez@rhca.nm.gov

1. **Any inquiries or requests** regarding this procurement should be submitted, in writing, to the Procurement Manager. Offerors may contact **ONLY** the Procurement Manager regarding this procurement. Other NMRHCA employees or Evaluation Committee members do not have the authority to respond on behalf of the NMRHCA.
2. **Protests of the solicitation or award must be submitted in writing to the Protest Manager identified in Section II.B.13.** As a Protest Manager has been named in this Request for Proposals, pursuant to §13-1-172, NMSA 1978 and 1.4.1.82 NMAC, **ONLY protests delivered directly to the Protest Manager in writing and in a timely fashion will be considered to have been submitted properly and in accordance with statute, rule and this Request for Proposals.** Protests submitted or delivered to the Procurement Manager will **NOT** be considered properly submitted.

E. PROPOSAL DELIVERY

Submissions of all proposals must be submitted via email to Marisol.galvez@rhca.nm.gov on or before the deadline.

Refer to Section III.A & B for instructions.

**Include RFP name and RFP # in Subject Line
Reference RFP Name: Legislative Consulting, Government Relations, and Lobbying Services 27-343-0380-000XX*

F. DEFINITION OF TERMINOLOGY

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

1. “**Agency**” means the New Mexico Retiree Health Care Authority.
2. “**Authority**” means the New Mexico Retiree Health Care Authority.
3. “**Award**” means the final execution of the contract document.
4. “**Business Hours**” means weekdays (Monday – Friday) 8:00 AM thru 5:00 PM ST/MDT, whichever is in effect on the date given.
5. “**Close of Business**” means weekdays (Monday – Friday) 5:00 PM MST/MDT, whichever is in effect on the date given.
6. “**Confidential**” means confidential financial information concerning Offeror’s organization and data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act §§57-3-A-1 through 57-3A-7, NMSA 1978,. See also NMAC 1.4.1.45. The following items may **not** be labelled as confidential: Offeror’s submitted Cost response, Staff/Personnel Resumes/Bios (excluding personal information such as personal telephone numbers and/or home addresses), and other submitted data that is **not** confidential financial information or that qualifies under the Uniform Trade Secrets Act.
7. “**Contract**” means any agreement for the procurement of items of tangible personal property, services or construction.
8. “**Contractor**” means any business having a contract with a state agency or local public body.
9. “**Determination**” means the written documentation of a decision of a procurement officer including findings of fact required to support a decision. A determination becomes part of the procurement file to which it pertains.
10. “**Desirable**” – the terms “may,” “can,” “should,” “preferably,” or “prefers” identify a desirable or discretionary item or factor.
11. “**Electronic Submission**” means a successful submittal of Offeror’s proposal to the procurement manager via email Marisol.galvez@rhca.nm.gov, in such cases where email submissions are accepted.
12. “**Electronic Version/Copy**” means a digital form consisting of text, images or both readable on computers or other electronic devices that includes all content that the Original and Hard Copy proposals contain. The electronic version/copy must be emailed.

13. “**Evaluation Committee**” means a body appointed to perform the evaluation of Offerors’ proposals.
14. “**Evaluation Committee Report**” means a report prepared by the Procurement Manager and the Evaluation Committee to support the Committee’s recommendation for contract award. It will contain scores and written evaluations of all responsive Offeror proposals.
15. “**Final Award**” means, in the context of this Request for Proposals and all its attendant documents, that point at which the final required signature on the contract(s) resulting from the procurement has been affixed to the contract(s) thus making it fully executed.
16. “**Finalist**” means an Offeror who meets all the mandatory specifications of this Request for Proposals and whose score on evaluation factors is sufficiently high to merit further consideration by the Evaluation Committee, as explained in Section II.B.8.
17. “**Hourly Rate**” means the proposed fully loaded maximum hourly rates that include travel, per diem, fringe benefits and any overhead costs for contractor personnel, as well as subcontractor personnel if appropriate.
18. “**IT**” means Information Technology.
19. “**Mandatory**” – the terms ”must,” ”shall” ”will,” ”is required,” or ”are required,” identify a mandatory item or factor. Failure to meet a mandatory item or factor may result in the rejection of the Offeror’s proposal.
20. “**Minor Irregularities**” means anything in the proposal that does not affect the price, quality and/or quantity, or any other mandatory requirement.
21. “**NMRHCA**” means the New Mexico Retiree Health Care Authority.
22. “**Offeror**” is any person, corporation, or partnership who chooses to submit a proposal.
23. “**Procurement Manager**” means any person or designee authorized by a state agency or local public body with the responsibility, authority, and resources to conduct the RFP procurement, make written determinations regarding the RFP procurement, and/or enter into or administer contracts as a result of the RFP procurement.
24. “**Procuring Agency**” means all State of New Mexico agencies, commissions, institutions, political subdivisions and local public bodies allowed by law to procure items of tangible personal property, services or construction from the agreement(s) awarded as a result of this RFP.
25. “**Project**” means a temporary process undertaken to solve a well-defined goal or objective with clearly defined start and end times, a set of clearly defined tasks, and a budget. The project terminates once the project scope is achieved and project acceptance is given by the project executive sponsor.

26. **“Redacted”** means a version/copy of the Offeror’s proposal with the information considered proprietary or confidential (as defined by §§57-3A-1 to 57-3A-7 NMSA 1978 and NMAC 1.4.1.45 and summarized herein and outlined in Section II.C.8 of this RFP) blacked-out BUT NOT omitted or removed.
27. **“Request for Proposals (RFP)”** means all documents, including those attached or incorporated by reference, used for soliciting proposals.
28. **“Responsible Offeror”** means an Offeror who submits a responsive proposal and who has furnished, when required, information and data to prove that his financial resources, production or service facilities, personnel, service reputation and experience are adequate to make satisfactory delivery of the services, or items of tangible personal property described in the proposal.
29. **“Responsive Offer”** or means an offer which conforms in all material respects to the requirements set forth in the request for proposals. Material respects of a request for proposals include, but are not limited to price, quality, quantity or delivery requirements.
30. **“Single Source Award”** means an award of contract for items of tangible personal property, services or construction to only one Offeror.
31. **“SPD”** means State Purchasing Division of the New Mexico State General Services Department.
32. **“Staff”** means any individual who is a full-time, part-time, or an independently contracted employee with the Offerors’ company.
33. **“State (the State)”** means the State of New Mexico.
34. **“State Agency”** means any department, commission, council, board, committee, institution, legislative body, agency, government corporation, educational institution or official of the executive, legislative or judicial branch of the government of this state. “State agency” includes the Purchasing Division of the General Services Department and the State Purchasing Agent but does not include local public bodies.
35. **“State Purchasing Agent”** means the Director of the Purchasing Division of the General Services Department.
36. **“Statement of Concurrence”** means an affirmative statement from the Offeror indicating its response to a required Section IV specification agreeing to comply and concur with the stated requirement(s). This statement shall be included in Offerors proposal, pursuant to Section III.C.1. (E.g. “We concur,” “Understands and Complies,” “Comply,” “Will Comply if Applicable,” etc.)

37. **“Unredacted”** means a version/copy of the proposal containing all complete information; including any that the Offeror would otherwise consider confidential, such copy for use only for the purposes of evaluation.
38. **“Written”** means typewritten on standard 8 ½ x 11 inch paper. Larger paper is permissible for charts, spreadsheets, etc.

G. PROCUREMENT LIBRARY

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

Electronic version of the RFP, Questions & Answers, RFP Amendments, etc. will all be posted to the website below.

The New Mexico Retiree Health Care Authority (NMRHCA) www.nmrhca.org

II. CONDITIONS GOVERNING THE PROCUREMENT

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

A. SEQUENCE OF EVENTS

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

Action	Responsible Party	Due Dates
1. Issue RFP	NMRHCA	TBD
2. Acknowledgement of Receipt Form	Potential Offerors	T+10
3. Pre-Proposal Conference	Agency	N/A
4. Deadline to submit Written Questions	Potential Offerors	T+12
5. Response to Written Questions	Procurement Manager	T+14
6. Submission of Proposal	Potential Offerors	T+28
7.* Proposal Evaluation	Evaluation Committee	T+29 to T+46
8.* Selection of Finalists	Evaluation Committee	T+37
9.* Oral Presentation(s)	Finalist Offerors	T+45
10.* Best and Final Offers	Finalist Offerors	T+46
11.* Finalize Contractual Agreements	Agency/Finalist Offerors	TBD
12.* Contract Awards	Agency/ Finalist Offerors	TBD
13.* Protest Deadline	SPD	+15 days

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

B. EXPLANATION OF EVENTS

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

1. Issue RFP

This RFP is being issued on behalf of the State of New Mexico Retiree Health Care on the date indicated in Section II.A, Sequence of Events. It will be available on the indicated date on the NMRHCA website at <http://www.nmrhca.org/> by selecting the “Request for Proposals’ link”.

2. Acknowledgement of Receipt Form

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

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

3. Pre-Proposal Conference

A pre-proposal conference will not be held as indicated in Section II.A, Sequence of Events, as not applicable.

4. Deadline to Submit Written Questions

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

5. Response to Written Questions

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

The Questions and Answers will be posted to: <http://www.nmrhca.org/>

6. Submission of Proposal

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

ALL PROPOSALS MUST BE RECEIVED BY THE PROCUREMENT MANAGER OR DESIGNEE NO LATER THAN 3:00 PM MST/MDT ON THE DATE INDICATED IN SECTION II.A, SEQUENCE OF EVENTS. NO LATE PROPOSAL CAN BE ACCEPTED.

It is the Offeror's responsibility to ensure all documents are completely uploaded and submitted electronically via email by the deadline set forth in this RFP. Please ensure that you, as the Offeror, allow adequate time for large uploads and to fully complete your

submittal by the deadline. A submission that is not both: (1) fully complete; and (2) received, via the email by the deadline, will be deemed late. Further, a submission that is not fully complete and received via email by the deadline because the response was captured, blocked, filtered, quarantined, or otherwise prevented from reaching the proper destination server by any anti-virus or other security software will be deemed late. In accordance with statute and rule, **NO LATE PROPOSAL CAN BE ACCEPTED.**

Proposals must be addressed and delivered to the Procurement Manager at the address identified in Section I.E via email. Proposals submitted by facsimile, or other electronic means other than via Marisol.galvez@rhca.nm.gov, will not be accepted.

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

7. Proposal Evaluation

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

8. Selection of Finalists

The Evaluation Committee will select and the Procurement Manager will notify the finalist Offerors as per schedule Section II.A, Sequence of Events or as soon as possible thereafter. A schedule for Oral Presentation, if any, will be determined at this time. Finalists will be comprised of the top Offerors receiving the highest cumulative scores in the following Sections: Section IV.B.1 Organizational Experience, Section IV.B.2 Organizational References, and Section IV.B.3 Mandatory Specifications.

9. Oral Presentations

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

10. Best and Final Offers

Finalist Offerors may be asked to submit revisions to their proposals for the purpose of obtaining best and final offers by as per schedule Section II. A., Sequence of Events or as

soon as possible. Best and final offers may also be clarified and amended at finalist Offeror's Oral Presentation.

11. Finalize Contractual Agreements

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

12. Contract Awards

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

13. Protest Deadline

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

Name: Sheri Ayanniyi, Protest Manager

Email: sheri.ayanniyi@rhca.nm.gov

PROTESTS RECEIVED AFTER THE DEADLINE WILL NOT BE ACCEPTED

C. GENERAL REQUIREMENTS

1. Acceptance of Conditions Governing the Procurement

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

2. Incurring Cost

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

3. Prime Contractor Responsibility

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

4. Subcontractors/Consent

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

5. Amended Proposals

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

6. Offeror's Rights to Withdraw Proposal

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

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

7. Proposal Offer Firm

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

8. Disclosure of Proposal Contents

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

- a. *Proprietary and Confidential information is restricted to:*

1. confidential financial information concerning the Offeror's organization; and
 2. information that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act, §§57-3A-1 through 57-3A-7 NMSA 1978.
- b. An additional but separate redacted version of Offeror's proposal, as outlined and identified in Section III.B.1.a, shall be submitted containing the blacked-out proprietary or confidential information, in order to facilitate eventual public inspection of the non-confidential version of Offeror's proposal.

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

If a request is received for disclosure of proprietary or confidential materials, the Agency shall examine the request and make a written determination that specifies which portions of the proposal should be disclosed. Unless the Offeror takes legal action to prevent the disclosure, the proposal will be so disclosed. The proposal shall be open to public inspection subject to any continuing prohibition on the disclosure of proprietary or confidential information.

9. No Obligation

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

10. Termination

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

11. Sufficient Appropriation

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

12. Legal Review

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

13. Governing Law

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

14. Basis for Proposal

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

15. Contract Terms and Conditions

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

The Agency discourages exceptions from the contract terms and conditions as set forth in the RFP Draft Contract. Such exceptions may cause a proposal to be rejected as nonresponsive when, in the sole judgment of the Agency (and its evaluation team), the proposal appears to be conditioned on the exception, or correction of what is deemed to be a deficiency, or an unacceptable exception is proposed which would require a substantial proposal rewrite to correct.

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

Offerors must provide a brief discussion of the purpose and impact, if any, of each proposed change followed by the specific proposed alternate wording.

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

16. Offeror's Terms and Conditions

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

17. Contract Deviations

Any additional terms and conditions, which may be the subject of negotiation (such terms and conditions having been proposed during the procurement process, that is, the RFP process prior to selection as successful Offeror), will be discussed only between the Agency

and the Offeror selected and shall not be deemed an opportunity to amend the Offeror's proposal.

18. Offeror Qualifications

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

19. Right to Waive Minor Irregularities

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

20. Change in Contractor Representatives

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

21. Notice of Penalties

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

22. Agency Rights

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

23. Right to Publish

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

24. Ownership of Proposals

All documents submitted in response to the RFP shall become property of the State of New Mexico. If the RFP is cancelled, all responses received shall be destroyed by the Agency or SPD unless the Offeror either picks up, or arranges for pick-up, the materials within three (3) business days of notification of the cancellation. Offeror is responsible for all costs involved in return mailing/shipping of proposals.

25. Confidentiality

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

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

26. Electronic mail address required

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

27. Use of Electronic Versions of this RFP

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

28. New Mexico Employees Health Coverage

- A. If the Offeror has, or grows to, six (6) or more employees who work, or who are expected to work, an average of at least 20 hours per week over a six (6) month period during the term of the contract, Offeror must agree to have in place, and agree to maintain for the term of the contract, health insurance for those employees if the expected annual value in the aggregate of any and all contracts between Contractor and the State exceed \$250,000 dollars.
- B. Offeror must agree to maintain a record of the number of employees who have (a) accepted health insurance; (b) decline health insurance due to other health insurance coverage already in place; or (c) decline health insurance for other reasons. These records are subject to review and audit by a representative of the state.
- C. Offeror must agree to advise all employees of the availability of State publicly financed health care coverage programs by providing each employee with, as a minimum, the following web site link to additional information <https://bewellnm.com>.
- D. For Indefinite Quantity, Indefinite Delivery contracts (price agreements without specific limitations on quantity and providing for an indeterminate number of orders to be placed against it); these requirements shall apply the first day of the second month after the

Offeror reports combined sales (from state and, if applicable, from local public bodies if from a state price agreement) of \$250,000.

29. Campaign Contribution Disclosure Form

Offeror must complete, sign, and return the Campaign Contribution Disclosure Form (APPENDIX B) as a part of their proposal. This requirement applies regardless whether a covered contribution was made or not made for the positions of Governor and Lieutenant Governor or other identified official. **Failure to complete and return the signed, unaltered form will result in Offeror's disqualification.**

30. Letter of Transmittal

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

Provide the following information:

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

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

31. Disclosure Regarding Responsibility

- A. Any prospective Contractor and any of its Principals who enter into a contract greater than sixty thousand dollars (\$60,000.00) with any state agency or local public body for professional services, tangible personal property, services or construction agrees to disclose whether the Contractor, or any principal of the Contractor's company:

1. is presently debarred, suspended, proposed for debarment, or declared ineligible for award of contract by any federal entity, state agency or local public body;
 2. has within a three-year period preceding this offer, been convicted in a criminal matter or had a civil judgment rendered against them for:
 - a. the commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) contract or subcontract;
 - b. violation of Federal or state antitrust statutes related to the submission of offers; or
 - c. the commission in any federal or state jurisdiction of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, violation of Federal criminal tax law, or receiving stolen property;
 3. is presently indicted for, or otherwise criminally or civilly charged by any (federal state or local) government entity with the commission of any of the offenses enumerated in paragraph A of this disclosure;
 4. has, preceding this offer, been notified of any delinquent Federal or state taxes in an amount that exceeds \$3,000.00 of which the liability remains unsatisfied. Taxes are considered delinquent if the following criteria apply.
 - a. The tax liability is finally determined. The liability is finally determined if it has been assessed. A liability is not finally determined if there is a pending administrative or judicial challenge. In the case of a judicial challenge of the liability, the liability is not finally determined until all judicial appeal rights have been exhausted.
 - b. The taxpayer is delinquent in making payment. A taxpayer is delinquent if the taxpayer has failed to pay the tax liability when full payment was due and required. A taxpayer is not delinquent in cases where enforced collection action is precluded.
 - c. Have within a three-year period preceding this offer, had one or more contracts terminated for default by any federal or state agency or local public body.)
- B. Principal, for the purpose of this disclosure, means an officer, director, owner, partner, or a person having primary management or supervisory responsibilities within a business entity or related entities.
- C. The Contractor shall provide immediate written notice to the State Purchasing Agent or other party to this Agreement if, at any time during the term of this Agreement, the Contractor learns that the Contractor's disclosure was at any time erroneous or became erroneous by reason of changed circumstances.
- D. A disclosure that any of the items in this requirement exist will not necessarily result in termination of this Agreement. However, the disclosure will be considered in the determination of the Contractor's responsibility and ability to perform under this Agreement. Failure of the Contractor to furnish a disclosure or provide additional information as requested will render the Offeror nonresponsive.
- E. Nothing contained in the foregoing shall be construed to require establishment of a

system of records in order to render, in good faith, the disclosure required by this document. The knowledge and information of a Contractor is not required to exceed that which is the normally possessed by a prudent person in the ordinary course of business dealings.

- F. The disclosure requirement provided is a material representation of fact upon which reliance was placed when making an award and is a continuing material representation of the facts during the term of this Agreement. If during the performance of the contract, the Contractor is indicted for or otherwise criminally or civilly charged by any government entity (federal, state or local) with commission of any offenses named in this document the Contractor must provide immediate written notice to the State Purchasing Agent or other party to this Agreement. If it is later determined that the Contractor knowingly rendered an erroneous disclosure, in addition to other remedies available to the Government, the State Purchasing Agent or Central Purchasing Officer may terminate the involved contract for cause. Still further the State Purchasing Agent or Central Purchasing Officer may suspend or debar the Contractor from eligibility for future solicitations until such time as the matter is resolved to the satisfaction of the State Purchasing Agent or Central Purchasing Officer.

32. New Mexico/Native American Resident Preferences

To ensure adequate consideration and application of §13-1-21 NMSA 1978 (as amended), **Offeror must submit a copy of its valid New Mexico/Native American Resident Preference Certificate or its valid New Mexico/Native American Resident Veteran Preference with its proposal.** Certificates for preferences must be obtained through the New Mexico Department of Taxation & Revenue <http://www.tax.newmexico.gov/Businesses/in-state-veteran-preference-certification.aspx>.

In accordance with §13-1-21(H) NMSA 1978, an agency shall not award any combination of New Mexico/Native American Resident Preferences.

III. RESPONSE FORMAT AND ORGANIZATION

A. NUMBER OF RESPONSES

Offerors shall submit only one proposal in response to this RFP.

B. NUMBER OF COPIES

1. Electronic Submissions Only

Proposals in response to this RFP must be submitted through NMRHCA’s procurement manager’s email address ONLY: (Marisol.galvez@rhca.nm.gov) The Offeror need only submit one single electronic copy of each portion of its proposal (Technical and Cost) as outlined below.

EXCEPTION: Single electronic files that exceed 50mb may be submitted as multiple uploads, which must be the least number of uploads necessary to fall under the 50mb limit. Separate the proposals as described below into separate electronic files for submission.

Proposals must be submitted in the manner outlined below. Technical and Cost portions of Offerors proposal must be submitted in separate uploads as indicated below in this section, and must be prominently identified as “Technical Proposal,” or “Cost Proposal,” on the front page of each upload.

Offerors **must** submit:

- a) Technical Proposals – One (1) ELECTRONIC upload must be organized in accordance with Section III.A.1. Proposal Format. All information for the Technical Proposal must be combined into a single file/document for uploading. EXCEPTION: Single electronic files that exceed 50mb may be submitted as multiple uploads, which must be the least number of uploads necessary to fall under the 50mb limit. The Technical Proposals SHALL NOT contain any cost information.
 - i. Confidential Information: If Offeror’s proposal contains confidential information, as defined in Section I.F.6 and detailed in Section II.C.8, Offeror **must** submit **two (2) separate ELECTRONIC technical files:**
 - One (1) ELECTRONIC version of the requisite proposals identified in Section III.B.1.a above as **unredacted** (def. Section I.F.40) versions for evaluation purposes; **and**
 - One (1) **redacted** (def. Section I.F.28) ELECTRONIC for the public file, in order to facilitate eventual public inspection of the non-confidential version of Offeror’s proposal. Redacted versions **must** be clearly marked as “REDACTED” or “CONFIDENTIAL” on the first page of the electronic file.
- b) **Cost Proposals** – One (1) ELECTRONIC upload of the proposal containing **ONLY** the Cost Proposal. All information for the cost proposal **must be combined into a single file/document for uploading.** *EXCEPTION: Single electronic files that exceed 50mb may be submitted as multiple uploads, which must be the least number of uploads necessary to fall under the 50mb limit.*

The ELECTRONIC proposal submission **must be fully submitted via e-mail** by the submission deadline in Section II.B.6.

It is the Offeror's responsibility to ensure all documents are completely uploaded and submitted electronically via NMRHCA's procurement manager's email Marisol.galvez@rhca.nm.gov by the deadline set forth in this RFP.

Please ensure that you, as the Offeror, **allow adequate time for large uploads and to fully complete your submittal by the deadline.** A submission that is not both: (1) fully complete; and (2) received, will be deemed late. Further, a submission that is not fully complete and received by the deadline because the response was captured, blocked, filtered, quarantined or otherwise prevented from reaching the proper destination server by any anti-virus or other security software will be deemed late. In accordance with statute and rule, **NO LATE OFFER CAN BE ACCEPTED.**

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

C. PROPOSAL FORMAT

All proposals must be submitted as follows:

Organization of files/envelopes for electronic copy proposals:

1. Proposal Content and Organization

All proposals must be submitted as follows:

Direct reference to pre-prepared or promotional material may be used if referenced and clearly marked. Promotional material must be minimal. Within each section of the proposal, Offerors must organize and address the RFP requirements in the order indicated below. All forms provided in this RFP must be thoroughly completed and included in the appropriate section of the Offeror's proposal.

Any and all discussion of proposed costs, rates or expenses must occur ONLY in the Cost Proposal.

Technical Proposal – DO NOT INCLUDE ANY COST INFORMATION IN THE TECHNICAL PROPOSAL.

1. Signed Letter of Transmittal
2. Signed Campaign Contribution Form
3. Table of Contents
4. Proposal Summary (Optional)
5. Response to Contract Terms and Conditions (from Section II.C.15)
6. Offeror's Additional Terms and Conditions (from Section II.C.16)
7. Response to Specifications (**except Cost information which shall be included ONLY in Cost Proposal**)
 - a. Organizational Experience
 - b. Organizational References
 - c. Oral Presentation (if applicable)
 - d. Mandatory Specification
 - e. Financial Stability (Financial information considered confidential, as defined in Section I.F.5 and

- detailed in Section II.C.8, should be placed in the **Confidential Information** file, per Section III.B.1.a.i, as applicable)
- f. Performance Surety Bond (if applicable)
 - g. New Mexico/Native American Resident Preferences (if applicable)
8. Other Supporting Material (if applicable)

Cost Proposal:

- 1. Completed Cost Response Form (APPENDIX D)

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

A Proposal Summary may be included in Offeror's Technical Proposal, to provide the Evaluation Committee with an overview of the proposal; however, this material will not be used in the evaluation process unless specifically referenced from other portions of the Offeror's proposal.

DO NOT INCLUDE COST INFORMATION IN THE PROPOSAL SUMMARY.

IV. SPECIFICATIONS

A. DETAILED SCOPE OF WORK

The following scope of work shall be used as a guideline in submitting proposals and shall be incorporated into the resulting contract between the New Mexico Retiree Health Care Authority (“NMRHCA”) and the successful Offeror (“Contractor”).

The Contractor shall provide legislative consulting, government relations, strategic legislative analysis, and lobbying services on an “as needed/if needed” basis in support of NMRHCA’s legislative, regulatory, and governmental affairs objectives.

Services shall include, but are not limited to, the following:

1. Legislative Strategy and Government Relations

The Contractor shall:

- a) Assist NMRHCA in developing and implementing legislative and governmental affairs strategies related to:
 - retiree health care;
 - public employee benefits;
 - health care policy;
 - appropriations and budget matters;
 - pharmacy and insurance-related legislation;
 - and other legislative or regulatory matters affecting NMRHCA.
- b) Work closely with the NMRHCA Board of Directors, Executive Director, and staff regarding legislative priorities, policy objectives, and proposed legislative initiatives.
- c) Provide strategic recommendations regarding legislative positioning, stakeholder engagement, bill amendments, and legislative communications.
- d) Assist NMRHCA in identifying and obtaining sponsors or co-sponsors for proposed legislation, when requested by NMRHCA.

2. Legislative Monitoring and Analysis

The Contractor shall:

- a) Monitor proposed legislation, amendments, interim committee discussions, executive actions, and other governmental activities that may affect NMRHCA operations, funding, governance, benefits, or eligibility policies.

- b) Review and analyze legislative proposals affecting NMRHCA and provide recommendations regarding:
 - legislative strategy;
 - amendments;
 - fiscal or operational impacts;
 - and stakeholder considerations.
- c) Work with NMRHCA leadership to help ensure proposed legislation affecting NMRHCA is actuarially, operationally, and administratively sound.
- d) Provide timely notification of significant legislative developments, hearings, amendments, or actions affecting NMRHCA.

3. Representation and Stakeholder Coordination

The Contractor shall:

- a) Represent NMRHCA before the New Mexico Legislature, legislative committees, interim committees, executive agencies, and other governmental entities, as directed by the Executive Director.
- b) Communicate NMRHCA-approved positions and legislative priorities to legislators, legislative staff, executive agencies, and stakeholder organizations.
- c) Attend legislative hearings, interim committee meetings, stakeholder meetings, and other governmental meetings involving matters affecting NMRHCA.
- d) Coordinate, as appropriate, with stakeholder groups, consultants, governmental entities, and other organizations regarding legislative matters affecting NMRHCA.
- e) Coordinate attendance of subject matter experts, witnesses, or supporting personnel for legislative or committee hearings, when requested by NMRHCA.

4. Conflict Disclosure and Compliance

The Contractor shall:

- a) Provide NMRHCA with an updated client list no later than thirty (30) days prior to each regular legislative session.
- b) Disclose any actual, potential, or perceived conflicts of interest involving NMRHCA and other Contractor clients.

- c) Notify NMRHCA in writing within twenty-four (24) hours of becoming aware of any conflict that may arise during the term of the contract.
- d) Propose appropriate mitigation measures or conflict resolution strategies acceptable to NMRHCA.
- e) Register and remain in compliance with the Lobbyist Regulation Act, NMSA 1978, Sections 2-11-1 through 2-11-9, as amended, and all other applicable laws and regulations.

5. Reporting, Communication, and Deliverables

The Contractor shall:

- a) Provide regular communication and legislative updates to the Board of Directors, Executive Director and designated NMRHCA staff regarding legislative activities and developments affecting NMRHCA.
- b) Provide written legislative reports during legislative sessions summarizing:
 - relevant legislation;
 - committee activity;
 - stakeholder discussions;
 - strategic recommendations;
 - and actions taken on behalf of NMRHCA.
- c) Provide periodic interim reports, updates, or summaries during non-session periods, as requested by NMRHCA.
- d) Attend and present at NMRHCA Board meetings, Executive Committee meetings, Finance Committee meetings, or other meetings as requested by the Executive Director. Attendance may be in person or virtual, as approved by the Executive Director.
- e) Submit detailed monthly invoices that include:
 - dates of service;
 - summary of activities performed;
 - time expended;
 - personnel performing services;
 - and any reimbursable expenses, if applicable.
- f) Provide additional reports, summaries, bill tracking documents, legislative calendars, or strategic updates reasonably requested by NMRHCA in support of the services described in this Scope of Work.

B. TECHNICAL SPECIFICATIONS

1. Organizational Experience

Offeror **must**:

- a) Provide a description of the Offeror's relevant experience providing legislative consulting, government relations, lobbying, and strategic legislative advisory services for public entities, healthcare organizations, retirement systems, or other similar organizations.

The narrative should describe the Offeror's experience and expertise related to:

- health care policy;
 - public employee or retiree benefits;
 - appropriations and budget matters;
 - governmental affairs; and
 - legislative strategy development.
- Include:
- a brief history of the firm;
 - description of ownership or affiliated entities, if applicable;
 - experience representing clients before the New Mexico Legislature and executive agencies; and
 - disclosure of any material litigation, ethics investigations, or regulatory actions within the last five (5) years.

- b) Provide resumes or biographies for all key personnel proposed to perform services under the resulting contract.

Include:

- name and title;
- role on the engagement;
- years of relevant experience;
- relevant education, certifications, or licenses;
- relevant legislative or governmental affairs experience; and
- office location and availability during legislative sessions.

- c) Describe the Offeror's approach to:

- legislative monitoring and reporting;
- communication with clients;
- strategic legislative analysis; and
- responding to time-sensitive legislative matters.

- d) Provide two (2) examples of similar engagements involving public entities, healthcare organizations, retirement systems, or comparable clients, including:

- a brief description of services provided;
- the Offeror's role; and
- the outcome achieved.

2. Organizational References

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

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

- a) Client name;
- b) Description of services provided;
- c) Project or engagement dates (beginning and ending);
- d) Description of the governmental, legislative, healthcare, or public sector environment in which services were performed;
- e) Staff assigned to reference engagement that will be designated for work per this RFP; and
- f) Client contact name, title, telephone number, address, and e-mail address.

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

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

3. Mandatory Specification

Offerors must provide a response to each specification listed below. Failure to respond to mandatory specifications may result in disqualification.

- a) Describe the Offeror's experience representing public entities, healthcare organizations, retirement systems, or governmental organizations before the New Mexico Legislature, executive agencies, or interim legislative committees.

The response should include a summary of relevant experience, areas of legislative or governmental affairs expertise, and the types of entities represented.

- b) Provide a complete list of current clients represented by the Offeror as of the date of proposal submission and disclose any actual or potential conflicts of interest involving NMRHCA.
- c) Provide a statement confirming the Offeror and proposed personnel are properly registered and authorized to perform lobbying services in the State of New Mexico, if applicable.

A statement of concurrence is required.

- d) Provide a statement confirming the Offeror will comply with all applicable state laws, regulations, and ethical requirements related to lobbying and governmental affairs services.

A statement of concurrence is required.

- e) Provide a statement confirming the Offeror can provide the minimum services identified in Section IV.A, Detailed Scope of Work.

A statement of concurrence is required.

- f) Offeror shall certify that it has the financial and operational capacity to perform the services required under this RFP for the duration of the resulting contract.

A statement of concurrence is required.

4. Desirable Specification

- a) Describe the Offeror's understanding of the services requested under this RFP and NMRHCA's legislative and governmental affairs environment.
- b) Describe the Offeror's proposed approach for providing legislative consulting, government relations, and lobbying services in support of NMRHCA's legislative and policy objectives.
- c) Provide examples of recent legislative, appropriations, policy, or governmental affairs accomplishments achieved for clients.
- d) Experience with healthcare policy, public employee benefits, retiree healthcare programs, appropriations, or state budget matters.
- e) Experience supporting public entities or healthcare organizations during significant legislative or policy initiatives.
- f) Additional reporting, legislative tracking, strategic planning, or stakeholder engagement capabilities available to support NMRHCA.

C. BUSINESS SPECIFICATIONS

1. Letter of Transmittal Form

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

2. Campaign Contribution Disclosure Form

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

3. Conflict of Interest Disclosure and Certification

The Offeror's proposal must be accompanied by the Conflict of Interest Disclosure and Certification located in APPENDIX G. The form must be completed and must be signed by

the person authorized to obligate the company. **Failure to submit a signed form will result in Offeror's disqualification.**

4. Oral Presentation

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

5. Cost

Offerors must complete the Cost Response Form in APPENDIX D.

All proposed hourly rates shall include gross receipts tax (GRT), travel within New Mexico, per diem, administrative expenses, overhead, and all other ordinary costs necessary to perform the services described in this RFP unless specifically identified otherwise.

NMRHCA makes no guarantee regarding the number of hours to be utilized under any resulting contract.

The resulting contract shall be on an "as needed/if needed" basis and shall contain annual not-to-exceed compensation amounts subject to negotiated contract terms and available funding.

6. Resident Business or Resident Veterans Preference

To ensure application of § 13-1-21 NMSA 1978 (as amended), an Offeror **MUST** submit a copy, in this section, of its valid New Mexico/Native Resident Preference Certificate or its valid New Mexico/Native American Resident Veteran Preference Certificate, as issued by the New Mexico Taxation and Revenue Department.

V. EVALUATION

A. EVALUATION POINT SUMMARY

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

Evaluation Factors <i>(Correspond to Sections IV.B and IV.C)</i>	Points Available
A. Technical Specifications (## Total Points)	
B. 1. Organizational Experience	280
B. 2. Organizational References	90
B. 3. Mandatory Specification	140
B. 4. Desirable Specification	140
B. Business Specifications (## Total Points)	
C.1. Letter Of Transmittal	Pass/Fail
C.2. Campaign Contribution Disclosure Form	Pass/Fail
C.3. Conflict of Interest Disclosure & Certification	Pass/Fail
C.4. Oral Presentations	100
C.5. Cost	250
TOTAL POINTS AVAILABLE	1,000
C.6. New Mexico / Native American Resident Preference	80
C.6. New Mexico / Native American Resident Veteran Preference Points per Section IV C.7	100

Table 1: Evaluation Point Summary

B. EVALUATION FACTORS

1. B.1 Organizational Experience (See Table 1)

Points will be awarded based on the thoroughness and clarity of Offeror's response in this Section. The Evaluation Committee will also weigh the relevancy and extent of Offeror's experience, expertise and knowledge; and of personnel education, experience and certifications/licenses.

2. B.2 Organizational References (See Table 1)

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

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

3. B.3 Mandatory Specifications

Points will be awarded based on adherence to the mandatory requirements outlined in the RFP. Points awarded in response to questions based on thoroughness and clarity. For items requiring a statement of concurrence required a Pass/Fail will be given, no points assigned for concurrence statements. Proposals that are considered non-responsive will be excluded from further evaluation.

4. B.4 Desirable Specifications

Points will be awarded based on the thoroughness and clarity of Offeror's response in this Section.

5. C.1 Letter of Transmittal (See Table 1)

Pass/Fail only. No points assigned.

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

Pass/Fail only. No points assigned.

7. C.3 Conflict of Interest Affidavit and Disclosure (See Table 1)

Pass/Fail only. No points assigned.

8. C.4 Oral Presentation (See Table 1)

Points will be awarded based on the quality, organization and effectiveness of communication of the information presented, as well as the professionalism of the presenters and technical knowledge of the proposed staff. Prior to Oral Presentation, Agency will provide the Offeror a presentation agenda. (If no Oral Presentations are held all Offerors will receive the maximum amount of total points for this Evaluation Factor).

9. C.5 Cost (See Table 1)

The evaluation of each Offeror's cost proposal will be conducted using the following formula:

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

10. C.6. New Mexico Preferences

Percentages will be determined based upon the point-based system outlined in § 13-1-21 NMSA 1978 (as amended).

A. New Mexico Resident Business Preference / Native American Resident Preference

If an Offeror has provided a copy of its New Mexico Resident Preference Certificate or Native American Resident Preference Certificate, the points awarded will be calculated as 8% of the total points available in this RFP.

B. New Mexico/Native American Resident Veteran Preference

If an Offeror has provided a copy of its New Mexico Resident Veteran Preference Certificate or Native American Resident Veteran Preference Certificate the points awarded will be calculated as 10% of the total points available in this RFP.

C. EVALUATION PROCESS

1. All Offeror proposals will be reviewed for compliance with the requirements and specifications stated within the RFP. Proposals deemed non-responsive will be eliminated from further consideration.
2. The Procurement Manager may contact the Offeror for clarification of the response as specified in Section II. B.7.
3. Responsive proposals will be evaluated on the factors in Section IV, which have been assigned a point value in Section V. The responsible Offerors with the highest scores may be selected as finalist Offerors, based upon the proposals submitted. In accordance with §13-1-117 NMSA 1978, the responsible Offerors whose proposals are most advantageous to the State taking into consideration the Evaluation Factors in Section V will be recommended for award (as specified in Section II.B.12). Please note, however, that a serious deficiency in the response to any one factor may be grounds for rejection regardless of overall score.

APPENDIX A

ACKNOWLEDGEMENT OF RECEIPT FORM

DRAFT

APPENDIX A

REQUEST FOR PROPOSAL

LEGISLATIVE CONSULTING, GOVERNMENT RELATIONS, AND LOBBYING SERVICES
27-343-0380-000XX

ACKNOWLEDGEMENT OF RECEIPT FORM

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

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

ORGANIZATION: _____

CONTACT NAME: _____

TITLE: _____ PHONE NO.: _____

E-MAIL: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE: _____

Submit Acknowledgement of Receipt Form to:

To: Marisol Galvez

E-mail: marisol.galvez@rhca.nm.gov

Subject Line: Legislative Consulting, Government Relations, and Lobbying Services, RFP# 27-343-0380-000XX

APPENDIX B

CAMPAIGN CONTRIBUTION DISCLOSURE FORM

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

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

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

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

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

The following definitions apply:

“Applicable public official” means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority

to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

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

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

“Pendency of the procurement process” means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

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

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

Name(s) of Applicable Public Official(s) if any: Governor Michelle Lujan Grisham and Lieutenant Governor Howie Morales

DISCLOSURE OF CONTRIBUTIONS BY PROSPECTIVE CONTRACTOR:

Contribution Made By: _____

Relation to Prospective Contractor: _____

Date Contribution(s) Made: _____

Amount(s) of Contribution(s) _____

Nature of Contribution(s) _____

Purpose of Contribution(s) _____

(Attach extra pages if necessary)

Signature

Date

Title (position)

--OR--

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

Signature

Date

Title (Position)

APPENDIX C

DRAFT CONTRACT

<Agencies: Appropriate **Draft Contract** ([DoIT Template](#), [Professional Services Template](#), [State Purchasing Draft Contract Template](#) for Goods/Services or Statewide Price Agreement, etc...) must be included in this Appendix C.

The **Draft Contract** must be as complete as possible; including all Agency/Federal Terms and Conditions, Detailed Scope of Work, Definitions, etc. This does not preclude agency from negotiating the final contract terms and conditions upon award.>

<The paragraph below must remain in this Appendix as notice to all Offerors.>

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

APPENDIX D

COST RESPONSE FORM

A. HOURLY RATE SCHEDULE

Personnel Classification	Proposed Hourly Rate
Principal Lobbyist / Government Relations Lead	\$ _____
Senior Lobbyist / Legislative Consultant	\$ _____
Legislative Analyst / Policy Support	\$ _____
Administrative Support	\$ _____
Other: _____	\$ _____

B. PROPOSED ANNUAL NOT-TO-EXCEED AMOUNTS

Contract Period	Proposed Annual Not-to-Exceed Amount
Year 1	\$ _____
Year 2	\$ _____
Year 3	\$ _____
Year 4	\$ _____

C. ADDITIONAL REIMBURSABLE EXPENSES

Identify any proposed reimbursable expenses not included in the hourly rates above.

If none, state "None."

APPENDIX E

LETTER OF TRANSMITTAL FORM

DRAFT

APPENDIX E

Letter of Transmittal Form

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

RFP#: 27-343-0380-000XX

1. Identify the following information for the submitting organization:

Offeror Name	
Mailing Address	
Telephone	
FED TIN#	
NM BTIN#	

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

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

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

3. Will any subcontractor/s be used in the performance of any resultant contract? (Select one):

No.
 Yes. Identify subcontractor/s: _____

4. Will any other entity/-ies (such as a State Agency, reseller, etc., that is not a subcontractor identified in #3 above) be used in the performance of any resultant contract? (Select one)

No.
 Yes. Identify entity/-ies: _____

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

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

Sign: _____ Date: _____

(Must be signed by the individual identified in item #2.A, above.)

APPENDIX F

ORGANIZATIONAL REFERENCE QUESTIONNAIRE

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

Offeror is required to send the following Organizational Reference Questionnaire to each business reference listed in its proposal, as per Section IV.B.2. The business reference, if it chooses to respond, is required to submit its response to the Organizational Reference Questionnaire directly to: Marisol Galvez at marisol.galvez@rhca.nm.gov by TBD, 2026, 3:00 PM MST/MDT for inclusion in the evaluation process. The Questionnaire and information provided will become a part of the submitted proposal. Businesses/Organizations providing references may be contacted for validation of content provided therein.

RFP # 27-343-0380-000XX
ORGANIZATIONAL REFERENCE QUESTIONNAIRE
FOR:

 (Name of Offeror)

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

Name: Marisol Galvez
 Email: marisol.galvez@rhca.nm.gov

Forms must be submitted no later than **3:00 PM on TBD, 2026**, and **must not** be returned to the organization requesting the reference. References are **strongly encouraged** to provide comments in response to organizational ratings. The comments you provide will help the State evaluate the above-referenced Offeror’s service history, successful execution of services and evidence of customer/client satisfaction.

For questions or concerns regarding this form, please contact the State of New Mexico Procurement Manager at (505) 222-6423 or marisol.galvez@rhca.nm.gov. When contacting the Procurement Manager, include the Request for Proposal number provided at the top of this page.

Organization providing reference	
Contact name and title/position	
Contact telephone number(s)	
Contact e-mail address	
Project description	
Project dates (start and end dates)	
Technical environment for the project your providing a reference (i.e., Professional Services for Legislative Consulting, Government Relations, and Lobbying Services);	

QUESTIONS:

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

COMMENTS:

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

COMMENTS:

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

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

COMMENTS:

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

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

COMMENTS:

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

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

COMMENTS:

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

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

Name: _____ Rating: _____

Name: _____ Rating: _____

Name: _____ Rating: _____

Name: _____ Rating: _____

COMMENTS:

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

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

COMMENTS:

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

COMMENTS:

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

COMMENTS:

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

COMMENTS:

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APPENDIX G

CONFLICT OF INTEREST DISCLOSURE AND CERTIFICATION

The undersigned Offeror certifies that, to the best of its knowledge and belief, no actual or potential conflict of interest exists that would impair the Offeror's ability to provide impartial and objective legislative consulting, government relations, and lobbying services to the New Mexico Retiree Health Care Authority ("NMRHCA").

- The Offeror has disclosed all current clients, contractual relationships, business interests, and lobbying or governmental affairs engagements that may create an actual, potential, or perceived conflict of interest involving NMRHCA.
- The Offeror agrees that if an actual or potential conflict of interest arises during the term of any resulting contract, the Offeror shall immediately provide written disclosure to NMRHCA describing the nature of the conflict and any proposed actions to avoid, mitigate, or neutralize the conflict.
- The Offeror certifies that neither the Offeror nor any proposed personnel are currently subject to any suspension, debarment, ethics restriction, lobbying prohibition, or governmental sanction that would prohibit performance under the resulting contract.
- The Offeror certifies that all information provided in this disclosure and certification is true and correct to the best of its knowledge and belief.

DISCLOSURE OF ACTUAL, POTENTIAL, OR PERCEIVED CONFLICTS

If none, state "None."

Authorized Representative: _____

Title: _____

Offeror Name: _____

Signature: _____

Date: _____

2027 Preliminary Plan Discussion

Solvency Results: 2020 - 2025:

	2021	2022	2023	2024	2025	2026
Trust Fund Balance @ June 30	\$ 1,056.2 million	\$ 1,092.6 million	\$ 1,256.3 million	\$ 1,504.6 million	\$1,804.7 million	TBD
Projected Solvency (Years)	30+	30+	30+	30+	30+	TBD
Projected Solvency Period	2052+	2053+	2054+	2055+	2056+	TBD
Projected Deficit Spending	2027	2033	2032	2034	N/A	TBD

Summary of Actions Taken for 2026:

1. Increased Pre-Medicare Plan Rates: 2 percent Retiree & Spouse/3 percent Child
2. Increased Medicare Supplement Rates: 0 percent
3. Prescription drug copay increases to both pre-Medicare and Medicare EGWP Plans
 - a. Retail: Generic \$10-\$30, Preferred Brand \$45-\$100, Non-Preferred Brand \$75-\$200
 - b. Mail Order: Generic \$24-\$70, Preferred Brand \$90-\$200, Non-Preferred Brand \$150-\$400
4. Introduction of deductible for Medicare EGWP of \$250 for prescriptions with exception of generics
5. Medicare Advantage Plans and Rates – Rate increases for two Plans of 42% & 76%

Influencing Factors:

1. Federal/State Health Care Legislation
2. Investment balances

Summary of Actions Taken for 2025:

6. Increased Pre-Medicare Plan Rates: 2 percent Retiree & Spouse/3 percent Child
7. Increased Medicare Supplement Rates: 2 percent
8. Elimination of all remaining plan 2 options – Due to IRA removal of coverage gap
9. Medicare Advantage Plans and Rates – Rate increases for Plan 1s from 0 to 42%

Influencing Factors:

3. Federal/State Health Care Legislation
4. Investment balances
5. Medical, Dental, & Vision RFP – New Contract July 1, 2024

Summary of Actions Taken for 2024:

10. Increased Pre-Medicare Plan Rates: 5 percent
11. Increased Medicare Supplement Rates: 0 percent
12. Hinge Health Program – Adopted, no longer pilot
13. Sword Health – Adopted to offer to Pre-65 Presbyterian Members
14. Medicare Advantage Plans and Rates – Rate increases from 0 to 50%

Influencing Factors:

6. Did not pass - SB193, HB150 or Special Appropriations/2023 Legislature Session
7. Federal/State Health Care Legislation
8. Investment balances
9. PBM RFP – New Contract July 1, 2022

Summary of Actions Taken for 2023:

1. Increased Pre-Medicare Plan Rates: 4 percent
2. Increased Medicare Supplement Rates: 2 percent
3. Pre-Medicare Plans - Increase emergency room copay Premier Plan to \$250, Value Plan to \$350
4. Pre-Medicare Plans - Increase urgent care facility copay Premier Plan to \$45, Value Plan to \$55
5. Pre-Medicare Plans - Increase BCBS tier 1 annual out of pocket limit from \$3,000 to \$3,750

Influencing Factors:

1. Did not pass - SB112 or Special Appropriations/2022 Legislature Session
2. COVID-19 related expenses
3. Presidential Executive Orders
4. Investment balances
5. PBM RFP – New Contract July 1, 2022
6. Plan Changes i.e., SB317 – No Behavioral Health Cost Sharing

Summary of Actions Taken for 2022:

1. Increased Pre-Medicare Plan Rates: 6 percent
2. Increased Medicare Supplement Rates: 4 percent
3. Medicare Supplement prescription plan network – Board Performance Network
4. Implemented Hinge Health Pilot Program – Approved for one-year
5. Delta Dental network change - Point of Service Network
6. Medicare Advantage Plan Rates – Ranged from -100% to +10%

Influencing Factors:

1. COVID-19 related expenses
2. Presidential Executive Orders
3. Investment balances
4. PBM RFP – New Contract July 1, 2022
5. Plan Changes i.e., SB317 – No Behavioral Health Cost Sharing

Summary of Actions Taken for 2021:

1. Increased Pre-Medicare Plan Rates: 5 percent
2. Increased Medicare Supplement Rates: 2 percent
3. Revised Medicare Advantage default strategy

4. Implementation of Livongo Diabetes Management Program
5. Contract arrangements
 - a. Site of service navigation (Presbyterian)
 - b. Access guarantees (Presbyterian)
 - c. Integrated care initiative (Presbyterian)
6. Pilot Programs
 - a. Paramedicine Programs (BCBS)
 - b. Tricare Data Analytics and Gap Closure Program (BCBS)
7. Medicare Advantage Plans
 - a. UHC MA Plan I: **-60 percent**
 - b. UHC MA Plan II: **-75 percent**
 - c. BCBS MA Plan I: **-54 percent**
 - d. BCBS MA Plan II: **-88 percent**
 - e. Humana MA Plan I: **-36 percent**
 - f. Humana MA Plan II: **-84 percent**
 - g. Presbyterian MA Plan I: **-40 percent**
 - h. Presbyterian MA Plan II: **-38 percent**

Influencing Factors:

1. Vetoing of House Bill 45/2021 Legislature Session
 - a. New Mexico economy
 - b. Pension fix for Educational Retirement Board
 - c. Timing associated w/receipt of increased employee and employer contributions
2. Rule Change effective date
3. COVID-19 claim impact
4. Investment losses

Considerations for 2027:

1. Increase Pre-Medicare Plan Rates – Medical trend
2. Increase Medicare Supplement Rates – Medical trend
3. Pre-Medicare Plan Design Changes – Offset cost to minimize premium rate increases
4. Medicare Advantage Plans and Rates – Plan designs and rates

Influencing Factors:

1. Federal/State Health Care Legislation
 - a. Inflation Reduction Act – Increase in costs to plans for Medicare Part D prescription benefit
2. Investment balances
 - a. Unfunded liabilities
3. PBM RFP – New Contract July 1, 2026
4. Referenced based pricing for urban hospitals