

**CENTERS FOR MEDICARE & MEDICAID SERVICES
AND
ADMINISTRATION ON AGING**

THROUGH

OGILVY PUBLIC RELATIONS WORLDWIDE

**MEDICARE-APPROVED DRUG DISCOUNT CARD
OUTREACH CAMPAIGN**

REQUEST FOR PROPOSALS

REQUESTS FOR FUNDING DUE JULY 30, 2004

**MEDICARE-APPROVED DRUG DISCOUNT CARD
OUTREACH CAMPAIGN
REQUESTS FOR PROPOSALS**

TABLE OF CONTENTS

| | |
|--|-----------|
| I. SUMMARY | 3 |
| II. BACKGROUND | 3 |
| III. PURPOSE..... | 4 |
| IV. ELIGIBLE APPLICANTS | 4 |
| V. TARGETED AREAS..... | 4 |
| VI. ELIGIBLE ACTIVITIES | 5 |
| VII. APPLICATION AND FUNDING OPTIONS..... | 6 |
| VIII. PROJECT DURATION AND MATCH | 7 |
| IX. APPLICATION DUE DATE | 7 |
| X. LETTER OF INTENT TO ABIDE BY TERMS AND CONDITIONS..... | 7 |
| XI. INSTRUCTIONS FOR DEVELOPING A PROPOSAL..... | 7 |
| XII. PROPOSAL ASSISTANCE..... | 10 |
| XIII. REPORTING REQUIREMENTS | 10 |
| XIV. PROPOSAL CHECKLIST | 11 |
| XV. PROPOSAL REVIEW CRITERIA | 11 |

I. Summary

HHS is conducting a nationwide outreach and education campaign to help Medicare beneficiaries learn about and enroll in the new Medicare-approved drug discount card program and transitional assistance credit. As part of this effort, the Centers for Medicare & Medicaid Services (CMS) and the Administration on Aging (AOA) are making funds available to community-based organizations (CBO) to support outreach, education and enrollment activities targeted specifically at low-income beneficiaries. This announcement describes the terms and conditions under which a community-based organization can apply for funds under this special initiative.

II. Background

The Medicare-approved Drug Discount Card and Transitional Assistance Credit Program was enacted into law on December 8, 2003, as part of the Medicare Prescription Drug, Improvement, and Modernization Act of 2003. Medicare beneficiaries, except for those who have Medicaid drug coverage, now have the opportunity to enroll in a Medicare-approved drug discount card program which can help to lower their prescription drug costs. The drug discount cards provide discounts off the regular cash price of prescription drugs.

In addition, beginning in June 2004, Medicare began to provide \$600 in 2004 and will provide up to an additional \$600 in 2005 to Medicare beneficiaries whose incomes are not more than 135 percent of the poverty line (\$12,569 for single individuals or \$16,862 for a married couple in 2004) if they do not have certain other drug coverage.

These new opportunities for Medicare beneficiaries are accompanied by an extraordinary challenge for those who serve them. The benefits of Medicare modernization can only be realized if beneficiaries and their family caregivers are sufficiently informed to make the complex choices that they will face. This challenge is especially significant for older members of minority, low-income, limited English-speaking, and other underserved populations.

While news stories, ads, high profile events, and other outreach are planned to help build awareness, many beneficiaries and caregivers will continue to rely on trusted local community-based organizations for information on comparing, choosing, and using a drug card. This is particularly true for the low-income beneficiaries who will be eligible for the \$600 credit.

The U.S. Department of Health and Human Services (HHS) has already launched a nationwide outreach and education campaign to assist Medicare beneficiaries in learning about and enrolling in the approved drug discount card program. As part of this effort, CMS and AOA are making available up to \$3.7 million to CBOs for Medicare-approved drug discount card outreach, education and enrollment activities targeted at low-income beneficiaries.

This new funding opportunity is part of a public and private sector partnership announced by HHS Secretary Thompson on May 27, 2004 to ensure that low-income Medicare beneficiaries take advantage of the substantive savings provided by the Medicare-approved drug discount cards.

III. Purpose

The purpose of this Request for Proposals is to provide resources to community-based organizations (CBO) to increase their capacity to help low-income Medicare beneficiaries learn about and enroll in the Medicare-approved drug discount card program and the transitional assistance credit program.

Community-based organizations, as visible and trusted sources of information at the local level, are recognized as an important avenue for expanding the awareness of Medicare beneficiaries about Medicare-approved drug discount cards and assisting them with enrollment in drug discount card and transitional assistance credit programs.

Using information and tools developed by HHS, awardees of this initiative will conduct outreach, education and enrollment assistance activities with low-income and underserved Medicare beneficiaries to ensure that they understand and enroll for a Medicare-approved drug discount card. Successful applicants will commit to coordinating with and participating in community-wide efforts relevant to Medicare drug discount card outreach, education and enrollment.

IV. Eligible Applicants

To be eligible for an award, an organization must meet the following criteria:

- Be a community-based non-profit organization or public entity that serves low-income and underserved Medicare beneficiaries.
- Have a mission that is compatible with the focus of this RFP and demonstrated experience in providing outreach and education to the target population; and
- Have access to e-mail and the Internet.

For-profit organizations/institutions are **not** eligible for funding under this RFP.

All organizations selected for funding will be required to meet the programmatic and operating criteria listed in the attached Letter of Intent to Abide by Terms and Conditions. These criteria have been established to show the applicant's interest in and commitment to disseminating CMS messages and materials about the discount card and \$600 credit and that the applicant meets specified contractual and policy requirements. Applicants must submit a signed Letter of Intent to Abide by Terms and Conditions at the time they submit their application for funding.

All organizations selected for funding will also be required to participate in a training session to be held on a date between September 13 and 30, 2004. In addition, applicants are required to visit and complete web-based training "Module 1 and Module 4" at <http://www.cms.hhs.gov/partnerships/tools/materials/medicaretraining/> to familiarize themselves with the Drug Discount Card program prior to submitting their proposal.

V. Targeted Areas

HHS will give priority to supporting community-based organizations (CBO), including partnerships of CBOs, in 30 targeted U.S. Primary Metropolitan Statistical Areas (PMSAs). HHS estimates that almost 70% of beneficiaries eligible for the transitional credit program reside

in these areas. Applications from urban or rural areas with demonstrated need, not listed below, will be accepted. The 30 targeted PMSAs are:

- New York, NY
- Los Angeles – Long Beach, CA
- Chicago, IL
- Philadelphia, PA – NJ
- Miami, FL
- Detroit, MI
- Tampa – St. Petersburg – Clearwater, FL
- Boston, MA
- San Diego, CA
- Riverside – San Bernardino, CA
- Atlanta, GA
- Houston, TX
- Baltimore, MD
- Pittsburgh, PA
- Dallas, TX
- Washington, DC – MD – VA – WV
- Orange County, CA
- St. Louis, MO – IL
- Phoenix – Mesa, AZ
- Cleveland – Lorain – Elyria, OH
- Newark, NJ
- Nassau – Suffolk, NY
- Ft. Lauderdale, FL
- San Francisco, CA
- Charlotte, Gastonia, Rock Hill, NC – SC
- Indianapolis, IN
- San Antonio, TX
- Portland – Vancouver, OR – WA
- Denver, CO
- Kansas City, MO - KS

There is no limit to the number or type of applications that may be received from a single PMSA. However, the number of applications funded will be limited by available resources.

VI. Eligible Activities

Community-based organizations may apply under this funding opportunity to conduct outreach, education and enrollment activities for the Medicare-approved drug discount card and transitional assistance program. These activities are defined as follows:

- **Outreach and Education**

The goals of outreach and education are to:

- Find Medicare beneficiaries who are likely to be eligible for the Medicare-approved Drug Discount Card and the transitional assistance program;
- Educate them about opportunities to save money;
- Encourage them to seek further assistance; and
- Help them to collect the information they will need to get assistance with enrollment.

Key strategies for outreach include:

- Public awareness efforts;
- Group education;
- Individual outreach;
- Marketing to targeted lists (e.g. people eligible for other low-income benefits); and
- Special efforts for underserved populations.

- **Enrollment**

The goals of enrollment are to:

- Assist people to determine for which benefits they want to apply; and
- Help them to complete and send in applications for desired benefits.

Key strategies for enrollment include:

- Self-help (by beneficiaries or their family members) through the www.medicare.gov Web site, and with other CMS tools and information materials;
- Enrollment Centers – Centralized phone banks and processing centers with staff and volunteers trained to assist with decision-support and enrollment; and
- “Out-stationed” enrollment specialists who are deployed in key community locations.

VII. Application and Funding Options

The application options for funding under this RFP are as follows:

Option 1: Single CBO Applicant – An eligible community-based organization may apply on its own for:

- **\$5,000** to conduct outreach and education activities to a single community or population group (e.g. African American, Hispanic American etc.), or
- **\$10,000** to conduct outreach and education activities in more than one community or across several population groups, or
- **\$15,000** to conduct enrollment activities in addition to outreach and education in more than one community or across several population groups.

Option 2: Collaborative Applicant – A group of CBOs may decide to come together to submit a single application. Collaborative applicants must designate a single lead agency to make application and to receive funding under this initiative. The amount requested under a collaborative application should reflect the number of CBOs in the collaborative and the funding amounts outlined above for Single CBO Applications. The maximum award for a collaborative applicant will be \$50,000.

Under either Option 1 or Option 2, no more than 10% of the total amount requested by any applicant can be used for management and administrative purposes.

Under both Option 1 and Option 2, HHS will require successful applicants to coordinate closely with CMS Regional Offices, SHIPs, and other outreach and enrollment activities in their communities.

Ogilvy PR will make provisions to provide successful candidates with upfront funding to fund their work plans (as described in their proposal) with subsequent funds disbursed upon successful achievement of outreach goals and objectives.

VIII. Project Duration and Match

The funding period for this initiative is expected to be August 2004 through February 2005 and funding will be on a one-time basis with no option for renewal.

Financial match is not required.

IX. Application Due Date

- Full proposals must be received by **4:00 PM (EDT) on July 30, 2004**
- Applicants are required to submit an original (not stapled or bound) and six (6) copies. Proposals that do not include an original and six (6) copies may not be accepted.
- Please submit proposals to:

Tom Beall, Project Director
Medicare Drug Discount Card Outreach Program
c/o Ogilvy Public Relations Worldwide
1901 L Street, NW
Suite 300
Washington, DC 20036

This Request for Proposals provides all the information needed to apply for funding: background information, timelines, proposal contents, etc.

Potential applicants are asked to inform Ogilvy Public Relations of their intention to bid for an award. Please email Joel Hochanadel at joel.hochanadel@ogilvypr.com by close of business on July 23, 2004.

X. Letter of Intent to Abide by Terms and Conditions

Organizations that request funding under this RFP are required to submit a Letter of Intent to Abide by Terms and Conditions with their proposal. Submitting a Letter of Intent confirms the applicant's eligibility to receive funds under this solicitation and expresses the applicant's intention to abide by all relevant terms and conditions. The Letter of Intent includes a disclosure statement to ensure that privileged communications are protected. The Letter of Intent also includes a statement that indicates that the organization understands that funding under this RFP is one-time and non-renewable.

XI. Instructions for Developing a Proposal

Proposals shall be single spaced using 12-point Arial font and 1-inch margins and shall not exceed 7 pages in total length for an individual CBO submission (option 1) or 12 pages for collaborative applications (option 2). HHS encourages applicants to submit proposals shorter in length as long as they address all components listed below. Proposals exceeding the total page limits will not be considered for funding.

Proposals shall include a table of contents and pages should be numbered.

Proposals shall include a cover page that includes the title of the RFP, the organization's (or lead organization's) name, address, and tax identification or Federal Identification Number, and the name, telephone and fax numbers, and email address for the contact person.

Proposal should include the following sections:

- 1) Target Audience
- 2) Organizational and Staff Capability
- 3) Measurable Goals and Objectives
- 4) Work plan and Timeframe
- 5) Funding Requested
- 6) Required Documentation

Requirements for each of these sections are described below.

1. Target Audience

Provide no more than one-half page describing the population you will be targeting and the geographic area you will be covering. Please describe the demographic and lifestyle characteristics of the population and any geographic/neighborhood/civic boundaries or features that could affect your outreach strategy.

2. Organizational and Staff Capability

In your proposal describe your organization and its ability to respond to the requirements of the RFP. You **must** include the following information:

Organizational Capabilities

- 1) State your organization's mission and discuss how it relates to the goals of this initiative;
- 2) Describe your organization, including its structure, the size of your membership or client population;
- 3) Discuss your organization's experience working with low income and underserved populations including African Americans, Hispanic Americans, Asian – Pacific Islanders, the non-elderly disabled, and other minority groups as appropriate; and
- 4) Discuss your organization's experience managing outside funding and the systems you have in place for tracking expenditures.

Staff Capabilities

- 1) Identify key staff for this project and where the project fits in the organizational structure;
- 2) Discuss the project manager's role and how this person will oversee the project activities. Describe the manager's experience working with and understanding the population(s) to be targeted;

3. Measurable Goals and Objectives

Each organization must develop a list of goals and objectives that meet the purpose of the RFP and meet the needs of the target population(s) that will be served.

In your proposal, include the following information:

- 1) State the overall **goal(s)** of the project. These goals should relate directly to the intent of the RFP;
- 2) Depending on the funding option selected (see Section VII above), specify which of the following measurable **objectives** your program will achieve and community(s) and populations (African American, Hispanic American, Asian – Pacific Islanders, the non-elderly disabled etc.) to be targeted.
 - a. For applications for **\$5,000**:
 - i. Projected number of people to be educated about Medicare-approved drug discount card and \$600 transitional assistance credit programs.
 - ii. Projected number of people who will be assisted in applying for these programs.
 - b. For applications for **\$10,000**:
 - i. Projected number of people in each community and/or targeted population groups to be educated about Medicare-approved drug discount card and \$600 transitional assistance credit programs.
 - ii. Projected number of people who will be assisted in applying for these programs.
 - c. For applications to provide outreach, education and enrollment activities (single CBO applications for **\$15,000**):
 - i. Projected number of people to be educated about Medicare-approved drug discount card and \$600 transitional assistance credit programs.
 - ii. Projected number of people who will be assisted in applying for these programs.
 - iii. Projected number of people who will be enrolled in these programs.

4. Work Plan and Timeframe

Provide a work plan for meeting the specified goals and objectives listed above. Include the following information in the description:

- The activities that you will undertake to achieve each objective and the timeline for completing those activities;
- Key partners that could assist in outreach activities; and
- Plans for coordination with other outreach and enrollment activities occurring in your community.

5. Funding Requested

We are not requesting a detailed budget with this application. Applicants only need to indicate the total amount of funding requested. However, applicants must identify if they are currently receiving CMS funding either directly or indirectly.

Single CBO Applicants can request funding only in the amounts \$5,000, \$10,000 or \$15,000. Collaborative Applicants can request funding that reflects the number of CBOs involved and the

activities to be undertaken, up to a limit of \$50,000, as outlined in Section VII. Collaborative applicants must detail the amount of funding to be allocated to each of the participating CBOs.

As stated in the Letter of Intent to Abide by Terms and Conditions, at least 90 percent of all funds requested under this RFP must be expended in support of direct service (i.e. outreach, education and enrollment activities). Management and administrative expenses, including travel and training, cannot exceed 10 percent of the total funds requested. Preference will be given to applicants that request less than 10 percent for such purposes.

Capital expenditures (e.g., computers, laptops, cell phones, furniture, renovations, etc.) are not allowed under this RFP.

Financial match or in-kind contributions are not required.

6. Required Documentation (not included in the page limit)

Each organization applying for funding must include:

- A copy of its current 501(c)(3) status certifying that it is a non-profit, community-based or a national non-profit organization;
- A copy of the organization's latest audit report (summary pages)

XII. Proposal Assistance

If you have questions about completing your application, please contact Mr. Joel Hochanadel, at (202) 452-9516 or by email at: joel.hochanadel@ogilvypr.com.

XIII. Reporting Requirements

Progress Report – A progress report describing all Work Plan activities completed through the end of November will be due December 31, 2004.

Final Report – Each subcontractor will be required to submit a final report describing all activities funded under this subcontract and describing performance in activities identified in the proposal Work Plans. Final reports will be due within one (1) month of completion of the project – March 31, 2005. The final report should include copies of all collateral materials produced with funds from the subcontract including flyers, brochures, handouts, etc.

XIV. Proposal Checklist

- _____ Letter of Intent to Abide by Terms and Conditions
- _____ Complete proposal including:
 - _____ Target Audience
 - _____ Organizational and Staff Capability
 - _____ Goals and Objectives
 - _____ Work Plan
 - _____ Funding Requested
- _____ Copy of current 501(c)(3) status
- _____ Copy of most recent audit report summary (summary statement)

XV. Proposal Review Criteria

Each section of the application will be scored using the following point system. A Review Panel will meet to discuss each application, and will then provide guidance based on both the assigned points and the discussion.

Funding decisions may take into consideration target populations served and the geographic location of applicants to ensure diversity among subcontractors.

| | Section | Points |
|----|-------------------------------------|---------------|
| 1. | Target Audience | 15 |
| 2. | Organizational and Staff Capability | 15 |
| 3. | Goals/Objectives | 25 |
| 4. | Work Plan | 40 |
| 5. | Funding Requested | 5 |
| 6. | Required Documentation | not scored |
| | Total Points | 100 |

Proposals will be evaluated based on the following criteria:

1. Target Audience

- Does the applicant describe the population they will be targeting?
- Does the applicant describe the geographic area they will be serving?

- Does the applicant discuss the characteristics of the population they will be serving and any geographic/neighborhood/civic boundaries or features that could affect their outreach strategy?

2. Organizational and Staff Capability

- Does the applicant describe the organization(s), including the structure, and the size of membership or constituency?
- Does the applicant discuss the organization's experience managing outside funding and systems in place for tracking expenditures?
- Does the applicant identify key staff for this project?
- Does the applicant discuss the manager's role in managing this project?

3. Goals/Objectives

- Does the applicant state the overall goal(s) of the project?
- Are the goals related directly to the goals of this Campaign?
- Does the applicant indicate the measurable objectives?
- Do the objectives address the specific target populations to be served?
- Does the applicant describe how the organization will continue to support this type of work in the future once the Campaign's project funding ends?

4. Work Plan

- Does the applicant include a brief discussion of how activities will complement/enhance existing programs within the organization?
- Does the applicant include a work plan describing key activities necessary to achieve project objectives?
- Does the applicant describe how they plan to coordinate with other outreach and enrollment activities occurring in their community?
- Is the work plan reasonable and understandable?

5. Funding Requested

- Is the requested funding in line with the goals and objectives and activities proposed?
- Does the applicant currently receive CMS funding either directly or indirectly?

CENTERS FOR MEDICARE & MEDICAID SERVICES ADMINISTRATION ON AGING

MEDICARE DRUG DISCOUNT CARD OUTREACH CAMPAIGN

LETTER OF INTENT TO ABIDE BY TERMS AND CONDITIONS

As a potential subcontractor of the Medicare Drug Discount Card Outreach Campaign, we agree that, if funded, we will adhere to the following provisions:

Program Criteria

Our organization, or collaborative of organizations, has:

- Expressed interest in, willingness to, and organizational mission consistent with disseminating HHS messages and materials about the drug discount card and transitional assistance.
- Proven access to and credibility with a significant population of low-income audiences, including, but not limited to, those defined as under-reached or underserved due to barriers of language, literacy, location, or culture.
- Commitment to provide interventions that support informed decision-making among low-income beneficiaries such as:

Outreach and Education

- Public communications such as newsletters, posters, pamphlets, and/or local media;
- Information days at local pharmacies and retailers—where CMS-developed materials are distributed and trained counselors are available to answer questions;
- Individualized outreach, including outreach to individuals eligible for other low-income benefits and who might be identified/reached through that characteristic (e.g., Food Stamp, public housing or energy assistance eligible);
- Neighborhood or community workshops and seminars;
- Training for senior volunteers who provide support and friendship to homebound elderly; and
- Group education and one-on-one counseling at senior centers, churches, and libraries.

Enrollment Support

- Support self-help (by beneficiaries or their family members) using CMS Web sites, the 1-800 number, other tools and information resources, and referrals to SHIPS;
- “Out-stationed” enrollment specialists who are deployed in key community locations; and
- Special efforts for underserved populations.

In addition, our organization, or coalition of organizations, agrees to:

- Visit and complete web-based training “Module 1 and Module 4” at <http://www.cms.hhs.gov/partnerships/tools/materials/medicaretraining/> prior to submitting their proposal.
- Participate in a training session on the Drug Discount Card program to be held on a date between September 13 and 30, 2004;
- Direct beneficiaries to www.medicare.gov and 1-800-Medicare as primary information sources; however, groups may secondarily provide CMS-developed information on their own Web sites and in all collateral materials (e.g. print, broadcast, etc.);
- Maintain ongoing communications by telephone, in person, or in writing with a designated Campaign Regional Facilitator;
- Communicate with the designated Campaign Regional Facilitator to coordinate outreach activities with those of the CMS REACH program at the relevant CMS Regional Office;
- Coordinate with and support other community-wide efforts relevant to Medicare drug discount card outreach, education and enrollment;
- Submit a final report summarizing all activities.

Operating Criteria

Our organization, or coalition of organizations, understands that the following operating criteria will be incorporated into all subcontracts. These criteria will ensure that funded organizations meet CMS’ contractual and policy requirements and include the following:

Neutrality. In all communications, services, materials, and support Subcontractors will operate in an honest broker role, maintaining neutrality regarding any and all information offered and consideration given to various card and benefit options.

Collaboration and coordination. Subcontractors agree to work in cooperation with existing REACH Networks, SHIPS, other CMS-supported partners, and other organizations and coalitions committed to supporting CMS Medicare education, outreach and enrollment objectives.

Apolitical. All activities will focus solely on enrollment support objectives. Subcontractors will operate in a manner that is strictly non-partisan and apolitical.

Disclosure. All Subcontractors will be expected to provide disclosure of potential/apparent conflicts of interest as a condition of participation, updated on a recurring basis.

Transparency. There will be full public acknowledgement of all (1) participants/members, (2) sources of funds, and (3) activities.

No actual or implied endorsement. Subcontractors cannot provide a direct or indirect endorsement of any position, product, or company.

Message conflict. Subcontractors agree to keep any relevant advocacy and public policy positions/stances/or messages separate and distinct from their public identification with this Task and its outreach efforts and mission.

Use of funds. Subcontractors must establish and adhere to procedures and policies to ensure CMS funds are not used to promote non-Medicare related benefits.

Privacy rights. Subcontractors will ensure that, in all dealings with beneficiaries or caregivers, appropriate procedures and policies are in place to ensure adherence to their privacy rights and HIPAA requirements.

Additional Terms

The applicant organization agrees that at least 90 percent of all funds requested under must be expended in support of direct service. Management and administrative expenses, including travel and training, will not exceed 10 percent of the total funds requested.

The applicant organization agrees that funding will be on a one-time basis with no option for renewal.

All applicants must complete and submit a disclosure statement identifying any potential or apparent conflict of interest between their participation in this effort and other activities in which they are engaged, for example, outreach or education related to a specific Medicare-approved drug discount card and/or other drug discount programs. If there are any real or perceived conflicts of interests, applicants must also submit a conflict mitigation plan that establishes how they propose to achieve a complete separation between activities funded under this solicitation and any other relevant and competing work in which they are or come to be engaged during the course of this subcontract. **(Please read and complete the attached Disclosure Statement).**

We hereby signify that the _____ organization, and all collaborating organizations, agree to abide by the terms and conditions outlined in this Letter of Intent.

Signed by:

Name of signing official

Title of signing official

Organization

Date

MEDICARE APPROVED DRUG DISCOUNT CARD

DISCLOSURE/CONFLICT OF INTEREST STATEMENT

The purpose of the Medicare Approved Drug Discount Card program is for community-based organizations to maximize the enrollment of eligible low-income Medicare beneficiaries in the \$600 transitional assistance program provided by the Centers for Medicare & Medicaid Services (CMS), especially among underserved populations. Through the period of performance, the subcontractors shall conduct community-level outreach activities to build awareness and understanding of the transitional assistance program and motivate eligible beneficiaries to enroll for the benefit.

DISCLOSURE BY COMMUNITY-BASED ORGANIZATIONS/SUBCONTRACTORS PARTICIPATING IN CMS DRUG DISCOUNT CARD PROGRAM

- a. Subcontractors must provide an Organizational Conflict of Interest certificate (OCI) which concisely describes all relevant facts concerning any past, present or currently planned interest, (financial, contractual, organizational, or otherwise) relating to the work to be performed and bearing on whether the subcontractor has a possible conflict of interest. Any financial disclosure should include the following:
 - Percentage of ownership in any other entity;
 - Income generated from other sources;
 - A description of all instances of any level of involvement in any business or contractual relationship or activities that may be viewed by a prudent business person as a conflict of interest;
 - A list of current or known future contracts or arrangements, regardless of size, with any of the following, including the dollar amount of the contracts or arrangements, the type of work performed, and the period of performance:
 - Insurance organization or subcontractor of an insurance organization;
 - Institutional and non-institutional providers of services or other individuals or entities furnishing services for which payment may be made under the Medicare program; and
 - All the entities contracted with or with which arrangements are made to conduct business operations.
 - The information required under this section is for all of the subcontractor's officers, directors and managers who would be or are involved with the performance of the contract.
- b. Subcontractors must also agree to keep any relevant advocacy and public policy positions/stances/or messages separate and distinct from their public identification with this project and its outreach efforts and mission; and
- c. If the subcontractor does not disclose any relevant facts concerning a conflict of interest, by submitting a proposal for review or if awarded, signing the Memorandum of Agreement, warrant that to the best of its knowledge and belief no such fact exists relevant to a possible conflict of interest.

REMEDIES FOR NONDISCLOSURE

The following are possible remedies should an a subcontractor refuse to disclose, or misrepresent, any information regarding a potential OCI:

- a. Refusal to provide adequate information may result in disqualification for award;
- b. Nondisclosure or misrepresentation of any relevant interest may also result in the disqualification of the subcontractor for award consideration;
- c. Termination of the contract, if the nondisclosure or misrepresentation is discovered after award;
- d. Disqualification from subsequent CMS funded contracts; and
- e. Other remedial action as may be permitted or provided by law or in the resulting Memorandum of Agreement.

By signing this, I agree that I have read, understand and will comply with the all conditions of the Disclosure Statement.

NAME (Please Print)

SIGNATURE

DATE

Please promptly sign and return this form with this proposal. If you have any questions, please call Joel Hochanadel (202) 452-9516 or joel.hochanadel@ogilvypr.com.

Thank you.