REQUEST FOR INFORMATION

FOR

CONTACT CENTER SERVICES

IDAHO HEALTH INSURANCE EXCHANGE

Project: **Contact Center Services**

Response Date: June 17, 2013, 12:00 noon

June 10, 2013

I. GENERAL INFORMATION

PROPOSAL -- The Idaho Health Insurance Exchange ("Exchange") is seeking qualified and experienced respondents to submit a statement of qualifications or other relevant information for creation of an Contact Center ("Project" or "Services"), as required by the Patient Protection and Affordable Care Act ("ACA").

The Exchange will be hiring a vendor or vendors to provide Contact Center Services. The responses to this RFI will be used to select potential companies for purposes of a subsequent and more detailed Request for Proposal.

The ACA requires, among other things, the Exchange to provide a toll free number and stand up a Contact Center in mid-2013, in advance of open enrollment beginning October 1, 2013. The Contact Center will receive inquiries and answer questions about health insurance eligibility and enrollment, health plan selection, rates, benefits, etc., and all core business related areas of the Exchange. The Contact Center will serve consumers with a simple and streamlined approach to ensure ease of use and customer satisfaction. The Contact Center will facilitate the application and enrollment process and provide assistance for both web-based and paper-based application processing. The Contact Center will help consumers with information and choices about the overall Exchange program and plans, private-industry qualified health plans ("QHPs") including the Advanced Premium Tax Credit ("APTC") and Cost Sharing Reduction programs, and Small Business Health Options Program ("SHOP"). The Contact Center will triage more complex questions to Marketplace Assistance Programs, Issuers of QHPs, and Department of Health and Welfare, as needed. The Contact Center will be the first point of contact for many consumers with questions about applying, determining eligibility, and enrolling in health insurance programs through the Exchange. The Exchange Customer Service Contact Center will assist and help consumers stay informed, educated, and enrolled in insurance affordability programs through the contact channel of the consumer's choice.

The responses to this RFI should include a description of the Contact Center's strategy for managing call volume and a description of the Contact Center's plan for translation services. Finally, the Call Center respondents should plan to comply with the standards set forth in Exhibit A.

Pursuant to state and federal law, the Exchange is charged with establishing a qualified health insurance exchange in Idaho. The Exchange will comply with all applicable state and federal laws, rules, and standards, including the Outreach and Education serviced required by the ACA.

GENERAL TERMS -- This Request for Information ("RFI") does not commit the Exchange to enter into an agreement, to pay any costs incurred in the preparation of this proposal or in subsequent negotiations, or to procure or contract for any Project or Services.

REVISIONS TO RFI -- In the event that it is necessary to revise any part of the RFI, timely addenda will be issued via facsimile or email to those firms that have requested a hard copy of the RFI.

RESERVATION OF RIGHTS BY EXCHANGE -- The issuance of this RFI does not constitute an assurance by Exchange that any contract will actually be entered into by the Exchange and Exchange expressly reserves the right to:

- Waive any immaterial defect or informality in any response or response procedure.
- Reject any and all responses.
- Request additional information and data from any or all respondents.
- Supplement, amend, or otherwise modify the RFI or cancel this request with or without the substitution of another RFI.
- Disqualify any respondent who fails to provide information or data requested herein or who provides inaccurate or misleading information or data.
- Disqualify any respondent on the basis of any real or apparent conflict of interest.
- Disqualify any respondent on the basis of past performance on other projects.
- The Exchange shall have the sole discretion to choose the best combination of qualifications and price for the Project and Services.
- The Exchange shall have the sole discretion to select one, none or several different vendors to provide the Services, or portions thereof, described in this RFI.

By responding to this request, each respondent agrees that any finding by the Exchange regarding any fact in dispute as to this proposal or the responses thereto shall be final and conclusive except as provided herein.

EVALUATION -- An Evaluation Committee will evaluate and determine the individual and comparative merits of each of each response received. It is the responsibility of the respondent to ensure that the response complies with this RFI, demonstrates qualifications, and provides the information requested. If the respondent fails to provide any information requested in this RFI, such failure may result in either non-qualification of a particular category of service or rejection of the proposal.

PROPRIETARY MATERIAL -- The Exchange assumes no liability for disclosure of proprietary material submitted by respondents. Proposal submittals may be considered public documents under applicable state law except to the extent portions of the submittals are otherwise protected under applicable law. Any specific items of information that is a trade secret and which is included in a response to this RFI shall be segregated by respondent from the other portions of the RFI response and labeled as such. Respondent shall not label an entire document as a “trade secret,” merely because a portion of that document is or may be a trade secret. If any trade secret information becomes the subject of a public records or other such request for production, the Exchange will notify the respondent and, upon the execution of an agreement to defend and indemnify the

Exchange, will allow the respondent to address the public records or other request on behalf of the Exchange in the appropriate forum.

II. MINIMUM QUALIFICATIONS

For the categories set forth below, please describe your Company's relevant experience and performance relating to the Services.

1. Please describe your relevant experience, expertise and performance in performing the types of duties described in this RFI, and include at least one example of a similar project executed in the last 24 months;

3. Please describe the personnel and other resources available for the Project;

4. Describe the experience and qualifications of your key personnel and indicate the primary contact(s) for the Exchange;

5. Identify and describe any subcontractor you anticipate using on the Project, including their area of expertise, background of key personnel working on the Project, and history of work with your Company;

6. Demonstrate that you have the financial resources to fulfill the obligations described in this RFI;

7. Please provide a list of at least three, but no more than five, professional references to whom your Company has provided services;

8. Please provide a summary, but not estimated amounts, of the types of fees and costs as well as the pricing model your Company will charge to provide the Services and any associated materials. You must separately disclose and itemize any commissions or fees anticipated to be received by your Company, any mark-ups for products and services from other vendors which would be charged to the Exchange, and any consideration or compensation provided to your Company from contracted vendors that you anticipate using on this Project.

9. Please describe how your Company will appropriately handle the conflicts of interest that may arise on the Project and description of your Company's conflict of interest policy.

SHORT LIST: Based on the responses to this RFI, the Exchange intends to include three or more firms on the short list of firms selected to submit a response to a Request for Proposal which will be issued by the Exchange to the firms on the short list.

III. REPONSES TO RFI AND EVALUATION CRITERIA

RESPONSE TIME: Responses to this RFI must be submitted to the address below and must be received by the Exchange at the address below by 12:00 noon MDT on Monday, June 17. Responses submitted beyond this date will be deemed non-responsive and not subject to consideration by the Exchange. Responses should include five bound copies and two electronic copies on flash drives or other portable media. Questions and requests for clarification must be sent to Amy Dowd in writing (c/o tmortell@hawleytroxell.com). No questions will be answered orally. In the discretion of the Exchange, relevant questions and the corresponding answers will be made available to all proposers.

INTRODUCTORY LETTER: An introductory letter shall accompany the proposals. The introductory letter should be addressed to:

Idaho Health Insurance Exchange
c/o Hawley Troxell Ennis & Hawley LLP/Tom Mortell
877 Main St., Ste. 1000
P.O. Box 1617
Boise, Idaho 83701-1617

The introductory letter should introduce the respondent's proposal and list a contact name, email address, and phone number.

FORMAT FOR SUBMITTAL: Each proposal shall be submitted in a format that provides the information described below. Content and completeness are important. Clear and effective presentations are preferred.

EVALUATION CRITERIA: The Exchange will use the following criteria to evaluate the responses to this RFI:

CRITERIA 1 – CORPORATE STRUCTURE AND EXPERIENCE: Provide history of the Company. Identify your corporate structure and ownership. Organization, number and type of personnel and the location of the Company's offices should be included. List several projects performed pertaining to the type of work you are proposing to perform under this RFI. This should include specific information on the dates and type of services provided. Describe how the Company is structured and set up to handle this type of work. List at least three (3) but no more than five (5) verifiable professional services references for whom you have provided services, with a contact person and phone number.

CRITERIA 2 − EXPERIENCE AND QUALIFICATIONS. Demonstrate that your company has the experience and qualifications to perform the duties described in this RFI.

CRITERIA 3 − PRICING MODEL/FEES AND COSTS (see above)

CRITERIA 4 − FINANCIAL WHEREWITHAL: Describe and demonstrate how you have the financial wherewithal to meet these obligations.

CRITERIA 5 − CONFLICTS OF INTEREST: Describe how your organization will ensure that conflicts of interest are appropriately disclosed and addressed.

EVALUATION CRITERIA The Exchange will evaluate responses to this RFI that conform to the proposal instructions outlined in this RFI and will assign scores of zero (0) to five (5) for the criteria listed above, with

5 - Excellent

4 - Good

3 - Satisfactory

2 - Marginal

0 **–** Unsatisfactory

EXHIBIT A

A. Culturally and Linguistically Appropriate Services (CLAS Standards).

The following standards will apply the Contact Center operated by the Exchange:Develop and maintain general knowledge about the racial, ethnic, and cultural groups in their service area, including each group's diverse cultural health beliefs and practices, preferred languages, health literacy, and other needs;

2. Collect and maintain updated information to help understand the composition of the communities in the service area, including the primary languages spoken;

3. Provide consumers with information and assistance in the consumer's preferred language, at no cost to the consumer, including the provision of oral interpretation of non-English languages and the translation of written documents in non-English languages when necessary to ensure meaningful access. Use of a consumer's family or friends as oral interpreters can satisfy the requirement to provide linguistically appropriate services only when requested by the consumer as the preferred alternative to an offer of other interpretive services;

4. Provide oral and written notice to consumers with limited English proficiency informing them of their right to receive language assistance services and how to obtain them;

5. Receive ongoing education and training in culturally and linguistically appropriate service delivery; and

6. Implement strategies to recruit, support, and promote a staff that is representative of the demographic characteristics, including primary languages spoken, of the communities in their service area.

B. Access for Persons with Disabilities.

1. The following standards will apply the Contact Center operated by the Exchange:

2. Ensure that any consumer education materials, Web sites, or other tools utilized for consumer assistance purposes, are accessible to people with disabilities, including those with sensory impairments, such as visual or hearing impairments, and those with mental illness, addiction, and physical, intellectual, and developmental disabilities;

3. Provide auxiliary aids and services for individuals with disabilities, at no cost, where necessary for effective communication. Use of a consumer's family or friends as interpreters can satisfy the requirement to provide auxiliary aids and services only when requested by the consumer as the preferred alternative to an offer of other auxiliary aids and services;

4. Provide assistance to consumers in a a manner that is accessible to individuals with disabilities;

5. Ensure that legally authorized representatives are permitted to assist an individual with a disability to make informed decisions;

6. Acquire sufficient knowledge to refer people with disabilities to local, state, and federal long-term services and supports programs when appropriate; and

7. Be able to work with all individuals regardless of age, disability, or culture, and seek advice or experts when needed.