

**REQUEST FOR PROPOSALS**  
**for**  
**Contact Center as a Service (CCaaS)**

**IDAHO HEALTH INSURANCE**  
**EXCHANGE**

**dba**

**YOUR HEALTH IDAHO**

**Project:** Idaho Health Insurance Exchange - YHI Contact Center as a Service (CCaaS)

**Response Date:** By May 6, 2022, 12:00 P.M. Mountain Time

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## INTRODUCTION AND BACKGROUND

### BACKGROUND

The Idaho Health Insurance Exchange doing business as Your Health Idaho (“YHI”) is seeking qualified and experienced respondents (each a “Respondent”) to submit a written response (“Proposal”) to this Request for Proposals (“RFP”) to provide Contact Center as a Service (CCaaS) services (the “Services”). This RFP process is intended to solicit binding Proposals from qualified candidates who have demonstrated an interest in performing these Services and have been deemed qualified to perform the work. This RFP process is expected to rapidly result in the selection by YHI of a Respondent to provide the Services and upon execution by both parties of the Contract Confirmation (Attachment A) and the Independent Contractor Agreement (Attachment B), to result in a binding agreement between YHI and Respondent (the selected Respondent is the “CCaaS Vendor”).

The mission of YHI is to maintain maximum control of Idaho’s health insurance marketplace at minimal cost to its citizens. Additionally, YHI will provide individuals and small businesses access to tools, easy to understand information and expert resources that will empower them to use YHI to protect their long-term economic interests, the wellbeing of their families and, in the case of businesses, their employees.

This RFP is for a CCaaS Vendor who is able to provide both Call Center as a Service with fully integrated CRM/Ticketing capabilities. CRM/Ticketing capabilities may be through a preferred partner but must be part of the CCaaS Vendor’s RFP response. **CCaaS Vendor Datacenters must reside within the United States per YHI’s Federal regulatory framework.**

YHI has partnered with Matrix Networks for vendor response review, selection and implementation oversight. Matrix Networks will work alongside YHI’s Chief Information Officer to review submissions, coordinate vendor demos, and lead all project management aspects of the CCaaS implementation for YHI. All consulting fees related to Matrix Networks services will be covered directly by interested Respondents and negotiated outside of this RFP.

### STATEMENT OF WORK / PROPOSAL REQUIREMENTS

This Section sets forth the scope of Services to be provided. Proposals may include additional Services if the cost for such additional Services is separately presented. RFP responses should outline in detail how the Respondent addresses each of the features outlined below:

- Standard Agents: 22
- Lead Agents: 3
- Supervisors: 3
- Overflow (other teams assisting): 20
- Seasonal: 30 September - February
- VDI: VMWare Horizon, no RDP, SSO
- 2 TFN
- 100 DIDs

- Automatic Call Distribution (ACD)Interactive Voice Response (IVR)Multi-language support
- Omnichannel Capabilities (e.g. Secure Chat, Secure Email, Web Forms/Work Items, SMS capabilities)
- Interactive Virtual Agents - including database look-up for report of ticket status and other information
- Click to Call (Outbound Call Management)
- Outbound Preview Dialing
- Performance Management
- Agent Assist functionality (the ability to present agents with data from existing knowledgebase based on keyword utterances)
- Engagement Quality Management including associated survey tools
- Workforce Optimization
  - Interaction review tools including customizable scoring systems
  - Screen and interaction recording capabilities (ability to securely download locally)
  - Agent Wallboards
  - Sentiment aware and keyword searchable database
- Customer Experience (e.g. NPS, CSAT)

## Desired Features

- Agent Assist
- Real Time Reporting
- AI: Quality Assurance
- Workforce Management
- Outbound Preview Dialing
- Omni Channel Integration
  - Email
  - Phone
  - Chat
  - Web Forms

## Required Documentation

- Compliance (*Datacenter Location Disclosure* along with any associated certification documentation)
  - NIST 800-53 revision 5
- Professional Services
- Technical Account Management (TAM)
- Detailed Cost Structure including all one-time, recurring and consumption-based billing
- Scalability of Platform
- Implementation Timelines
- Onboarding

- Training and Project Documentation

## ADMINISTRATIVE

### PROPOSAL INQUIRIES

Potential Respondents may make inquiries regarding this RFP any time during the inquiry period listed below. YHI may not respond to any improperly formatted inquiries. YHI will not respond to any inquiries received after 12:00 P.M. Mountain Time (MT) on the inquiry period end date. YHI may extend the proposal due date in its sole discretion.

To inquire, vendors can send an email to [RFP@YourHealthIdaho.org](mailto:RFP@YourHealthIdaho.org). Answers will be addressed in writing and posted to the YHI website ([www.yourhealthidaho.org/vendors](http://www.yourhealthidaho.org/vendors)) by 5:00 P.M. MT April 29, 2022.

### DUE DATES

All Proposals are due by 12:00 P.M. MT on May 6, 2022. Any Proposal received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late Proposals will not be evaluated for award; provided that YHI reserves the right to revise the due date for all Proposals by a notice posted at [www.yourhealthidaho.org/vendors](http://www.yourhealthidaho.org/vendors).

### SCHEDULE OF EVENTS

Event	Date All times listed are Mountain Time (MT)	Time (MT)
1. RFP Distribution to Potential Respondents on Website	April 4, 2022	5:00 P.M.
2. Questions from Potential Respondents Due	April 22, 2022	12:00 P.M.
3. Responses to Potential Respondents Due (Sent electronically and posted to YHI website.)	April 29, 2022	5:00 P.M.
4. Proposal Due Date	May 6, 2022	<b>12:00 P.M.</b>
5. Target Date for Review of Proposal	Week of May 9, 2022	N/A
6. Top Vendor Demos	Week of May 16, 2022	TBD
7. Anticipated Decision and Selection of Vendor	May 27, 2022	TBD
8. Anticipated Commencement Date of Work	June 6, 2022	N/A
9. Tentative Go-Live	August 1, 2022	N/A

### PROPOSAL SUBMITTAL

Each Respondent must submit signed copies of its Proposal to [RFP@YourHealthIdaho.org](mailto:RFP@YourHealthIdaho.org). The Proposal is a binding offer to contract with YHI that remains open and irrevocable for a period of 60 days after submission. The Proposal must follow this format:

- Cover Letter (include phone and e-mail contact)

- Respondent Information:
  - Respondent and Integrator References (3 minimum)
  - Respondent Business History
- Proposed charges including hourly rates if applicable and any fixed price for all or a portion of the Proposal
- Deliverables\*
- Deliverable Timeline\*
- Responses to Technical Questions provided in Attachment C
- Names and/or profiles of key staff members and project lead
- Conflict of Interest Statement
- Payment Address
- Proof of Insurance
- W-9 Form
- Completed Attachments A, B and C
- Compliance Documentation: Respondent is required to submit any relevant compliance documentation to support the overall security posture of its platform. This may include but is not limited to, SOC2 audit reports.

\*As such deliverables and timeline may be mutually agreed to by YHI and CCaaS Vendor and may be amended and/or extended pursuant to the terms of the Independent Contractor Agreement and YHI's Procurement Policy.

NOTE: Electronic submissions to [rfp@yourhealthidaho.org](mailto:rfp@yourhealthidaho.org) are subject to the May 6, 2022 12:00 P.M. MT deadline please.

### **Restrictions on Communications**

From the issue date of this RFP until the CCaaS Vendor is selected, Respondents and their representatives are not allowed to communicate with any YHI staff, Board members, or other involved parties regarding this procurement except the RFP Issuing Officer, Kevin M. Reddish, Chief Information Officer or his designee. For violation of this provision, YHI reserves the right to reject any Proposal.

### **Disposition of Proposals**

All Proposals received by YHI shall upon receipt become and remain the property of YHI. YHI shall have the right to use all concepts contained in any Proposal and this right will not affect the solicitation or rejection of any Proposal.

### **Release of Claims**

By submitting a Proposal, the Respondent agrees that it will not bring any claim or cause of action against YHI based on: 1) any misunderstanding concerning the information provided herein; 2) concerning YHI's failure, negligent or otherwise, to provide the Respondent with pertinent information as intended by this RFP; or 3) YHI's decision to select a different party as the CCaaS Vendor.

## **Subcontractors**

In the event a Proposal is submitted that involves more than one organization, one organization shall be designated as the Respondent. All other participants shall be designated as subcontractors. All subcontractors shall be identified by name and for each proposed subcontractor, background information along with a description of the functions or tasks the subcontractor(s) would perform under this RFP must be included consistent with instructions found elsewhere in this RFP. The Respondent shall be wholly responsible for the entire performance whether or not subcontractors are used. The project leader (Project Manager) shall be an employee of the Respondent and meet all the relevant requirements.

The Respondent must acknowledge a binding agreement between the Respondent and any subcontractors has been executed. YHI reserves the right to review and reject any subcontracting agreements.

## **Amendment to this RFP**

YHI reserves the right to amend this RFP at any time. Amendments prior to the deadline for Proposal submissions will be posted to YHI's website at [yourhealthidaho.org](http://yourhealthidaho.org). It is the responsibility of the Respondent to monitor the website for amendments and other communications from the Issuing Officer.

As part of the cover letter included with the Proposal, the Respondent shall acknowledge receipt of amendments, if any, to the RFP by identifying all amendment numbers and dates of posting.

## **Withdrawals**

Prior to the submission deadline for the Proposal, an already submitted Proposal may be withdrawn by the Respondent by submitting a written request for its withdrawal to YHI, signed by the Respondent. Transmission of the written request via email is acceptable.

A Respondent may submit an amended Proposal before the submission deadline for Proposals. Such amended Proposal must be a complete replacement for a previously submitted Proposal and must be clearly identified as such in the Transmittal Letter of the amended Proposal. YHI will not merge, collate, or assemble Proposal materials.

Unless requested by YHI, no other amendments, revisions, or alterations to Proposals will be accepted after the submission deadline for Proposals, except as stated in this RFP or any amendment thereto.

## **Cancellation of the RFP**

The RFP may be canceled and any or all Proposals may be rejected in whole or in part, when it is determined to be in the best interest of the YHI or the State of Idaho. YHI shall not be liable for any costs, expenses, loss of profits, or damages whatsoever incurred by the Respondent in the event this RFP is canceled or a Proposal is rejected.

## **Additional Materials and Documentation**

Upon request from YHI, each Respondent shall submit any additional materials and documentation

reasonably required by YHI in its evaluation of the Proposal.

### **Acceptance of Proposals**

All Proposals properly submitted will be accepted by YHI. However, YHI reserves the right to request necessary amendments from a Respondent, reject any or all Proposals received, or cancel this RFP, according to the best interests of YHI and the residents of the state of Idaho.

YHI also reserves the right to waive minor irregularities in Proposals, providing such action is in the best interest of YHI or the State of Idaho. In the event YHI waives any minor irregularity in any Proposal, such waiver shall in no way modify the requirements of this RFP or excuse the Respondent from full compliance with the specifications of this RFP nor excuse the CCaaS Vendor from any contract requirement. At the sole discretion of YHI, YHI may contact the Respondent to clarify irregularities or provide missing requirements. The Respondent is required to submit clarifications or missing requirements with a turnaround time to be determined by YHI.

YHI reserves the right to exclude any and all non-responsive Proposals from any consideration under this RFP.

### **Proposal Opening and Inspection**

During the Proposal evaluation and award recommendation period, Proposals shall not be available for inspection. Proposals shall not be opened publicly but shall be opened in the presence of two or more individuals selected by YHI. The register of Proposals and Proposals shall be open to public inspection after a CCaaS Vendor has been selected.

### **Irregular Proposals**

Proposals may be considered irregular and rejected for the failure to comply with the instructions herein or demonstrating a failure to comply with applicable law.

### **Proposal Considerations**

Unless withdrawn prior to the Proposal due date, each Proposal shall remain a valid Proposal for 60 days from the Proposal due date.

Proposals that are submitted in a timely manner and meet the mandatory submittal requirements of this RFP will be reviewed and evaluated in accordance with this RFP.

By responding to this RFP, each Respondent acknowledges that YHI is working under significant time constraints and may or may not have the resources to provide a full and complete evaluation of every proposal received in response to this RFP. In that regard, YHI reserves the right, if deemed necessary and in its sole discretion, to conduct an initial review of all Proposals for the purpose of establishing a list of qualified semi-finalists. The initial review will be based on factors that are consistent with the evaluation criteria outlined below. In such an event, YHI will then move forward with a complete evaluation of those proposals. YHI will not be obligated to disclose the list of semi-finalists to any



Respondent.

A Proposal Review Team will be charged with evaluating Proposals based on the criteria set forth below. During the evaluation process, YHI may contact a Respondent for the purpose of obtaining clarification of its Proposal. YHI may, at its discretion, select finalists to provide a presentation to the Proposal Review Team either in person or remotely.

### **Award**

Notification of intended contract award, if any, shall be provided to the selected Respondent on or about the date specified in this RFP. Such notification shall be subsequently confirmed in writing. The contract award is subject to availability of funding. Until YHI returns a countersigned Contract Confirmation and Independent Contractor Services Agreement, there is no binding agreement and YHI retains the freedom to determine how to proceed, notwithstanding any notification of intended contract award it may have provided.

Neither YHI nor the State of Idaho are liable for any work, costs, expenses, loss of profits, or any damages whatsoever incurred by the CCaaS Vendor prior to the official starting date, and contract work prior to this date may result in no payment. YHI reserves the right to modify this policy; any modification will be made in a written statement and signed by both YHI and the CCaaS Vendor.

### **Contract Negotiation Process**

Upon completion of the evaluation process, YHI may select one Respondent to be CCaaS Vendor, based on the evaluation findings and other criteria deemed relevant for ensuring that the decision is in the best interest of YHI and the State of Idaho. In the event that for any reason YHI does not complete the contract with the selected Respondent within three (3) days of such selection, YHI reserves the option of negotiating with another Respondent.

### **Protest Policy and Procedures**

Respondents who submit Proposals in response to this RFP may protest the award of the contract resulting from this RFP. A Notice of Intent to Protest must be made in writing to YHI, attention Executive Director, and must be received no later than two (2) working days from the notice of non-award. If no such Notice of Intent to Protest is timely filed, the Respondent forgoes its ability to pursue a protest.

A Protest Notification must be made in writing to the Executive Director and must be received no later than five (5) working days from the notice of non-award. The Protest Notification must contain specific grounds for the protest. Supporting documentation must be included with the protest. A protest must state all grounds upon which the protesting party asserts that the solicitation or award was improper. Issues not raised by the protesting party in the protest are deemed waived. A protest that is incomplete or not submitted within the prescribed time limits will be summarily dismissed.

Only the following are acceptable grounds for protest:

- Failure to follow YHI procedures established in this RFP or YHI rules of procurement

- Errors in computing scores which contributed to the incorrect selection of a Respondent
- Bias, discrimination, or conflict of interest on the part of an evaluator

For clarification, but without any limitation, the following are not acceptable grounds for protest:

- Evaluator qualifications to serve on the Proposal Review Team
- The professional judgment of the Proposal Review Team
- YHI's assessment of its own needs regarding the RFP

## EVALUATION FACTORS FOR AWARD

### REQUIREMENTS

The following will be considered in determining the Respondent to be selected for this project, per a standardized scoring methodology:

- Adherence to RFP Instructions and Completeness: 15% of score
- Background - Relevant skills and experience (Product/Implementation/Support): 15% of score
- Proposed contractor rate(s) and pricing: 30% of score
- Acceptance of terms of the Independent Contractor Agreement set forth in Appendix B 25% of score
- Functionality – the ability to match the solution and scope to outlined requirements: 15% of score

The successful Respondent will provide a complete Proposal meeting the requirements of this RFP, which may also include additional Services appropriate for the scope and subject matter of the project.

The successful Respondent will be required to pass a background check conducted by YHI, if requested. YHI also reserves the right to obtain and consider information from other sources concerning a Respondent, such as the Respondent's capability and performance under other contracts.

Each Proposal is required to include a signed Contract Confirmation in the form attached as Attachment A and a signed copy of the Independent Contractor Agreement attached as Attachment B. Each Proposal may propose changes to the Independent Contractor Agreement by submitting a signed copy marking the changes made and including an editable and unlocked Word version also marking such changes. Respondents are encouraged to make few or no changes, as the extent of changes will be a significant factor in determining the successful Respondent.

Each Proposal must include a minimum of three (3) references with contact information for each reference. Reference contacts must be from a client who managed or supervised you or your firm's work or who had oversight responsibility for you or your firm's performance for that work experience. The reference contact must be available to validate the experience provided on the dates specified in the resume. Include the following information for each reference:

1. Engagement name
2. Brief description of the engagement
3. Contact name and title
4. Contact phone numbers and email address

The Proposal should also propose the governance model and procedures to ensure a well-run project, including any expectations of the commitment and availability of resources from YHI, and any other entities outside the Respondent's own team. The Proposal should describe how Respondent would initially engage with YHI and its stakeholders to organize and perform this work.

The Services will comply with all applicable rules, standards and specifications of the State of Idaho, the federal government and other regulatory agencies. The successful Respondent to this RFP must be licensed, if applicable, qualified, and must have the demonstrated ability to provide similar services for other projects similar in size and nature to the Services.

As much as is practical and to the extent allowed by Idaho and federal law, YHI requests that Respondents team with companies that have a significant presence in Idaho.

## GENERAL INFORMATION

### GENERAL TERMS

This RFP does not commit YHI to enter into an agreement, to pay any costs incurred in the preparation of the Proposal or in subsequent negotiations, or to procure or contract for any Services. Each Proposal is submitted as an offer to contract with YHI that may be accepted by YHI by countersignature of the Contract Confirmation and the Independent Contractor Agreement, in the discretion of YHI, or YHI reserves the right to respond to any or all Respondents for their best and final offer, including guidance by YHI on those portions of the Proposal that it suggests be revised, and reserves the right to further negotiate with Respondents to achieve the best result for YHI.

### RESERVATION OF RIGHTS BY YHI

The issuance of this RFP does not constitute an assurance by YHI that any contract will actually be entered into by YHI and YHI expressly reserves the right to:

- Waive any immaterial defect or informality in any Proposal or Proposal procedure.
- Reject any and all Proposals.
- Request additional information and data from any or all Respondents.
- Supplement, amend, or otherwise modify the RFP or cancel this request with or without the substitution of another RFP.
- 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 collusion or conflict of interest.

- Disqualify any Respondent on the basis of past performance on other projects or being in arrears on existing contracts with the State of Idaho or having defaulted on a previous contract with the State of Idaho.
- Prior to the response time, YHI may meet with and consult with some or all of the potential Respondents to this request.
- YHI may negotiate with any Respondent to this RFP and shall have the sole discretion to choose the best combination of qualifications and price for the Project and Services.
- YHI shall have the sole discretion to select one, none or several different Respondents to provide the Services, or portions thereof, as described in this RFP.

By responding to this RFP, each Respondent agrees that any finding by YHI regarding any fact in dispute as to this RFP or the Proposals shall be final and conclusive except as provided herein.

## **EVALUATION**

A Proposal Evaluation Team will evaluate and determine the individual and comparative merits of each of the Proposals received. It is the responsibility of the Respondent to ensure that its Proposal complies with this RFP, demonstrates qualifications, and provides the information requested. If the Respondent fails to provide any information requested in this RFP, such failure may result in either non-qualification of a particular category of service or rejection of the Proposal. The Proposal Evaluation Team may choose to interview some, none or all Respondents.

## **PROPRIETARY MATERIAL**

YHI assumes no liability for disclosure of proprietary material submitted by Respondents. Proposal submittals may be considered public documents under applicable Idaho law except to the extent portions of the submittals are otherwise protected under applicable Idaho law. Any specific items of information that constitute trade secrets and which are included in a response to this RFP shall be segregated by Respondent from the other portions of the RFP 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, YHI will notify the Respondent and, upon the execution of an agreement to defend and indemnify YHI, will allow the Respondent to address the public records or other request on behalf of YHI in the appropriate forum.

## **AGREEMENTS**

Each Proposal must include signed copies of the following:

- A signed Contract Confirmation in the form attached as Attachment A
- The YHI independent contractor agreement attached as Attachment B, with any changes proposed by the Respondent marked clearly in the document signed (and Respondent must also submit an editable version in the form provided by Respondent).

## **PRICE PROPOSAL**

The Proposal must include all fees and charges for the provision of Services. Respondents should provide

a detailed breakdown of all fees and costs. At a minimum, Respondents should include hourly rates for the performance of the Services that are commercially competitive for the level of skill and experience of each category of personnel proposed to provide Services. YHI encourages fixed price proposals, setting a single price for all or portions of the Services.

**QUESTIONS AND RESPONSE TIME**

Questions or requests for clarification must be submitted by 12:00 P.M. Mountain Time (MT), April 22 2022. Questions and requests for clarification must be sent to RFP@YourHealthIdaho.org. No questions will be answered orally. YHI will answer all submitted questions by potential Respondents by posting responses to YHI’s website on by 5:00 P.M. MT April 29 2022.

Responses to this RFP must be received by 12:00 P.M. MT May 6, 2022 and should be sent to RFP@YourHealthIdaho.org

## ATTACHMENT A: CONTRACT CONFIRMATION

Respondent is required to submit a signed copy of the attached Contract Confirmation offering to contract with YHI on the terms of the Independent Contractor Agreement and NDA required to be submitted herein and the terms of this RFP and the Proposal submitted by the Respondent, which offer will remain open for sixty (60) days from submission by the Respondent.

## ATTACHMENT B: INDEPENDENT CONTRACTOR AGREEMENT

Respondent is required to submit a signed copy of the attached Independent Contractor Agreement, with any changes proposed by the Respondent marked in the copy it signs and submits. Respondents are encouraged not to make changes to this agreement, and changes to the agreement will be evaluated as set forth above.

In executing the Independent Contractor Agreement, Respondent is agreeing to comply with the privacy and security standards and related definitions set forth in Appendixes A and B thereto, which are incorporated into and made part of the Independent Contractor Agreement as well as all federal, state and local laws protecting the privacy, security or integrity of Personal Information (as such term is defined in the Independent Contractor Agreement).

## ATTACHMENT C: TECHNICAL REQUIREMENTS/QUESTIONS

Respondents are required to submit completed responses to the attached Technical Questions. Respondents are encouraged to answer all questions asked within the Technical Questions document. Please provide screenshots where applicable. Any questions that are unanswered/skipped will be considered “unable to support” by the CCaaS vendors platform and evaluated as such as part of the overall completeness of the RFP response.

## ATTACHMENT D: DRUG FREE WORKPLACE CERTIFICATION

## ATTACHMENT E: DEFINITIONS TO NON-EXCHANGE ENTITY AGREEMENTS

## ATTACHMENT F: PRIVACY AND SECURITY STANDARDS AND IMPLEMENTATIONS