

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

IDAHO HEALTH INSURANCE
EXCHANGE

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YOUR HEALTH IDAHO

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

Response Date: January 24th 2020, 12:00 P.M. Mountain Time

CONTENTS

BACKGROUND	3
ADMINISTRATIVE	4
EVALUATION FACTORS FOR AWARD	9
GENERAL INFORMATION.....	10

BACKGROUND

BACKGROUND

The Idaho Health Insurance Exchange doing business as Your Health Idaho (“YHI”) is seeking qualified and experienced respondents (“Respondent”) to submit a written response (“Proposal”) to this Request for Proposals (“RFP”) to provide Contact Center as a Service (CCaaS) services (“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 request for proposals is for a single CCaaS Vendor who is able to provide both Call Center as a Service and 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. YHI will contract with a single CCaaS Vendor as part of this RFP. **CCaaS Vendor Datacenters must reside within the United States per YHI’s Federal regulatory framework.**

STATEMENT OF WORK (SOW)

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’s technology platform addresses each of the activities outlined below:

- Automatic Call Distribution (ACD)
- Interactive Voice Response (IVR)
- Omnichannel Capabilities
- Performance Management
- Workforce Optimization
- Quality Management
- Customer Experience
- CRM/Ticketing (*Native vs Integrated*)
- Compliance (*Datacenter Location Disclosure*)
- Professional Services
- Technical Account Management (TAM)
- Detailed Cost Structure
- Scalability of Platform

- Implementation Timelines
- Onboarding
- Training

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 make an inquiry, vendors can send an email to RFP@YourHealthIdaho.org. Answers will be addressed in writing and posted to the YHI website (www.yourhealthidaho.org/vendors) by 12:00 P.M. MT January 17, 2020.

DUE DATES

All Proposals are due by 12:00 P.M. MT on January 24, 2020. 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 notice posted at www.yourhealthidaho.org/vendors.

SCHEDULE OF EVENTS

Event	Date All times listed are Mountain Time (MT)
1. RFP Distribution to Potential Respondents on Website	January 3, 2020
2. Questions from Potential Respondents Due	January 10, 2020
3. Responses to Potential Respondents Due (Sent electronically and posted to YHI website.)	January 17, 2020
4. Proposal Due Date	January 24, 2020
5. Target Date for Review of Proposal	January 31, 2020
6. Top Vendor Demos	Week of February 7, 2020
7. Anticipated Decision and Selection of Vendor	February 14, 2020
8. Anticipated Commencement Date of Work	March 16, 2020

PROPOSAL SUBMITTAL

Each Respondent must submit signed copies of its Proposal to 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 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*
- 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 are subject to the January 24, 2020 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.

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. 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 cancelled 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 cancelled 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.

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

Disallowed grounds include:

- 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:

- Scope and completeness of Proposal: 10% of score
- Relevant skills and experience: 25% of score
- Proposed contractor rate(s) and charges: 35% of score
- Acceptance of terms of the Independent Contractor Agreement set forth in Attachment B: 30% 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 one reference 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 have the demonstrated ability to provide similar services for other projects similar in size.

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 this 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. 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), January 10, 2020. Questions and requests for clarification must be sent to RFP@YourHealthIdaho.org. No questions will be answered orally. Relevant questions and the corresponding answers will be made available to all proposers at the following event:

Answers to questions will be posted to YHI website by 12:00 P.M. MT January 17, 2020.

Responses to this RFP must be received by 12:00 P.M. MT January 24, 2020 and should be sent to RFP@YourHealthIdaho.org

APPENDIX A: PRIVACY AND SECURITY STANDARDS AND IMPLEMENTATION SPECIFICATIONS FOR NON-EXCHANGE ENTITIES

YHI will enter into contractual agreements with all Non-Exchange Entities that gain access to Personally Identifiable Information (“PII”) exchanged with YHI, or directly from Consumers, Applicants, Qualified Individuals, Enrollees, Qualified Employees, and Qualified Employers, or these individuals’ legal representatives or Authorized Representatives. That agreement and its appendices, including this Appendix A, govern any PII that is created, collected, disclosed, accessed, maintained, stored, or used by Non-Exchange Entities in the context of YHI. In signing that contractual agreement, in which this Appendix A has been incorporated, Non-Exchange Entities agree to comply with the standards and implementation specifications laid out in this document and the referenced MARS-E suite of documents while performing the Authorized Functions outlined in their respective agreements.

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.

ATTACHMENT C: TECHNICAL REQUIREMENTS

Respondent is required to submit a completed copy of the attached Technical Requirements. Respondents are encouraged to answer all questions outlined within the requirements document. Please provide screenshots where applicable. Any requirements that are unanswered/skipped will be considered “unable to support” by the CCaaS vendors platform as part of the overall completeness of the RFP response.