

**REQUEST FOR PROPOSALS**  
**for**  
**OUTREACH AND EDUCATION SERVICES**  
**IDAHO HEALTH INSURANCE EXCHANGE**

**Project: Outreach and Education Services**

**Response Date: June 10, 2013, 12:00 noon.**

May 28, 2013

## **I. GENERAL INFORMATION**

**PROPOSAL** – The Idaho Health Insurance Exchange (“Exchange”) is seeking qualified and experienced respondents to submit a written response to this Request for Proposals (“RFP”) to perform Outreach and Education Services (“Services” or “Project”) for the Exchange, as required by the Patient Protection and Affordable Care Act (“ACA”). This RFP process is intended to solicit binding proposals from the pre-qualified candidates who have demonstrated an interest in the Project and have been deemed qualified to perform the 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 complexity to the Project. The successful respondent must provide evidence of financial stability and capability to fund and/or guarantee all costs associated with its proposal. As much as is practical and to the extent allowed by Idaho and federal law, the Exchange requests that respondents to this RFP team with companies that have a significant presence in Idaho.

**GENERAL TERMS** – This RFP 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 Services.

**REVISIONS TO RFP** – In the event that it is necessary to revise or amend any part of the RFP, timely addenda will be issued by email to those firms that have been pre-qualified to respond to the RFP.

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

- Waive any immaterial defect or informality in any response or response 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 conflict of interest.
- Disqualify any respondent on the basis of past performance on other projects.

- Prior to the response time, the Exchange may meet with and consult with some or all of the potential respondents to this request.
- The Exchange 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.
- The Exchange shall have the sole discretion to select one, none or several different vendors to provide the Services, or portions thereof, as described in this RFP.

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 the proposals received. It is the responsibility of the respondent to ensure that the 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 Evaluation Committee may choose to interview some, none or all respondents.

**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 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, 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.

**CONTRACT** – The successful respondent firm will enter into a standard Professional Services Agreement, a copy of which is attached as Exhibit B.

## **II. RESPONSES TO RFP AND EVALUATION CRITERIA**

The basic scope of the Services is set forth in Exhibit A. Exhibit A includes two distinct scopes of work. Respondents may respond to either or both scopes of work. Responses to this RFP shall consist of two parts, a technical proposal and a price proposal. The technical proposal will include a detailed description of your Company’s plan for providing the Services described in Exhibit A, a proposed schedule for performing those services on an immediate and expedited basis and any other information which will assist the Exchange in understanding your

Company's plan for successfully achieving the goals in stated in the RFP. The Exchange will also consider information submitted by your company in response to the Request for Information ("RFI") issued by the Exchange on May 10, 2013.

The price proposal will provide a summary 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, including a total estimated cost for the Project. 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. The technical proposal and price proposal will be evaluated separately.

**RESPONSE TIME:** Responses to this RFP must be to the following individual:

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

Questions or requests for clarification must be submitted by 5:00 PM Monday, June 4, 2013. Questions and requests for clarification must be sent to Amy Dowd in writing (c/o tmortell@hawleytroxell.com) with any questions. No questions will be answered orally. All questions and the corresponding answers will be made available to all proposers.

Responses to this RFP must be received by 12:00 noon, June 10, 2013. Responses submitted beyond this date may be deemed non-responsive and not subject to consideration by Exchange. Responses should include five bound copies and two electronic copies. The electronic copies should consist of a single PDF file on two flash drives or other similar portable media.

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

**CRITERIA 1 – CORPORATE STRUCTURE AND EXPERIENCE** (from RFI Response, plus any supplementation you deem necessary).

**CRITERIA 2 – EXPERIENCE AND QUALIFICATIONS** (from RFI Response, plus any supplementation you deem necessary)

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

**CRITERIA 4 – PROPOSED PLAN AND SCHEDULE.** (see above)

**CRITERIA 5 – FINANCIAL WHEREWITHAL** (from RFI Response, plus any supplementation you deem necessary).

**WEIGHTED EVALUATIONS:** The Exchange will evaluate responses to this RFP that conform to the proposal instructions outlined in this RFP and will assign scores of zero (0) to five (5) with

5 - Excellent

4 - Good

3 - Satisfactory

2 - Marginal

0 – Unsatisfactory

The Exchange will weigh the criteria as follows and determine a Weighted Score:

**CRITERIA 1 – CORPORATE STRUCTURE AND EXPERIENCE** \_\_\_\_\_ x 2.0 = \_\_\_\_\_

**CRITERIA 2 – EXPERIENCE AND QUALIFICATIONS** \_\_\_\_\_ x 4.0 = \_\_\_\_\_

**CRITERIA 3 – PRICING MODEL/FEES AND COSTS** \_\_\_\_\_ x 5.0 = \_\_\_\_\_

**CRITERIA 4 – PROPOSED PLAN AND SCHEDULE** \_\_\_\_\_ x 7.0 = \_\_\_\_\_

**CRITERIA 5 –FINANCIAL WHEREWITHAL** \_\_\_\_\_ x 2.0 = \_\_\_\_\_

## EXHIBIT A

### BASIC SCOPE OF PROJECT AND SERVICES

The successful respondent(s) to this RFP will drive the creation and dissemination of information to Idahoans which will assist them in making informed decisions regarding their health insurance options in, and outside of, the state exchange. Please state how your firm will achieve this goal.

Also, for both Scopes of Work described below, demonstrate how your firm's work products will satisfy the cultural and linguistically appropriate requirements as required by the ACA. If you choose, you may provide additional information not requested below, however, your plan must include at least the following:

#### Work Scope No. 1

- Market Research: Create a comprehensive understanding of Idahoans who may be interested in obtaining health insurance by using the Idaho Health Insurance Exchange.
  - Leverage existing work completed by the Idaho Department of Insurance
  - Create demographic/psychographic exhibits of Idaho consumers to assist in the initial, and on-going, process of providing educational opportunities and information required to make informed decisions regarding health insurance options
- Branding: Develop a market brand for the Idaho Health Insurance Exchange (IHIX), including:
  - Name
  - Logo
  - Style and use guide
  - Messaging
  - All creative work and materials required for media and collateral
- Media Plans:
  - Paid media, including:
    - Proposed budgets
    - Mass media (Television, print, radio, billboards, etc.)
    - Direct marketing

- Digital strategies and on-line presence (social media channels, search engine marketing (SEM), search engine optimization (SEO), interactive learning opportunities for consumers)
  - Earned Media
    - Press kit
    - Press release plan (topics, timelines)
    - News placement
    - Op-ed articles and opportunities (topics, authors, timelines, media targets)
    - Speakers bureau (list of qualified authorities on various topics related to IHIX) and speaking opportunities
    - Public service materials
- Web-site Design and User Experience
  - Optimized user experience
  - Consistency of branding/messaging
  - Content management (both hosted by vendor and maintained by IHIX staff)
- Public Relations
  - A broad scope plan which supports all aspects of providing factual, timely, and understandable information to assist Idahoans in making informed decisions regarding their health insurance.
- Collateral and Display Materials
  - Printed and electronic letters, brochures, forms
  - Banners, posters, large format display material, etc.

### Work Scope No. 2

- Education and Outreach strategy: create an integrated work plan to develop authoritative material provide information and educational opportunities to citizens throughout Idaho. Some examples of how this may be accomplished include, but are not limited to:
  - Town hall meetings
  - Health districts
  - Campus-based presentations
  - Chambers of Commerce

- Civic organizations
- Provider (physician, hospital) facilities
- Native American Tribal Authorities
- Commission on Hispanic Affairs