

REQUEST FOR QUALIFICATIONS
for
COMMERCIAL REAL ESTATE SERVICES

IDAHO HEALTH INSURANCE
EXCHANGE

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YOUR HEALTH IDAHO

Project: Idaho Health Insurance Exchange - YHI Commercial Real Estate Services

Response Date: May 7, 2019, 5:00 P.M. Mountain Time

RFQ April 19, 2019

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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 Qualifications (“RFQ”) to provide commercial real estate services (“Services”). This RFQ process is intended to solicit a written statement of qualifications from candidates who have an interest in performing these Services and are qualified to perform the work. This RFQ process is expected to rapidly result in the selection by YHI of a Respondent to provide the Services, subject to the execution of a mutually acceptable engagement agreement between YHI and Respondent with respect to the same (the selected Respondent is the “Commercial Real Estate 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 qualifications is for a Commercial Real Estate Vendor.

STATEMENT OF WORK (SOW)

This Section sets forth the scope of Services YHI expects the Commercial Real Estate Vendor to be able to provide and the Proposal should include, without limitation, the Respondent’s qualifications with respect to the following commercial real estate activities:

- Identifying potential office space for either lease or purchase
- Assist YHI in the lease versus buy financial analysis for potential properties
- Negotiate with lessor or seller on terms
- Provide comparison property analysis
- Present and/or support recommendations to YHI’s Finance Committee and Board of Directors

YHI understands and acknowledges that compensation for the Services may vary depending upon the specific needs and determinations of YHI. Nonetheless, the Proposal should include Respondent’s customary pricing parameters for lease and purchase transactions, as well as any pricing philosophies or other generally applicable pricing information that Respondent wants YHI to consider.

ADMINISTRATIVE

PROPOSAL INQUIRIES

Potential Respondents may make inquiries regarding this RFQ 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 5:00 P.M. 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) by 5:00 P.M. MT May 1, 2019.

DUE DATES

All Proposals are due by 5:00 pm, MT, on May 7, 2019. 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.

SCHEDULE OF EVENTS

Event	Date All times listed are Mountain Time (MT)
1. RFQ Distribution to Potential Respondents	April 19, 2019
2. Questions from Potential Respondents Due	April 26, 2019
3. Responses to Potential Respondents Due (Sent electronically and posted to YHI website.)	May 1, 2019
4. Proposal Due Date	May 7, 2019
5. Target Date for Review of Proposal	May 10, 2019
7. Anticipated Decision and Selection of Vendor	May 17, 2019
8. Anticipated Commencement Date of Work	May 24, 2019

PROPOSAL SUBMITTAL

Each Respondent must submit signed copies of its Proposal to RFP@YourHealthIdaho.org. The Proposal must follow this format:

- Cover Letter (include phone and e-mail contact)
- Respondent Qualification Information:
 - o Respondent References (two minimum)
 - o Respondent Business History
 - o Relevant Experience and Qualifications
 - o Customary pricing parameters for lease and purchase transactions, as well as any pricing philosophies or other generally applicable pricing information that Respondent wants YHI to consider

- Names and/or profiles of key staff members and project lead
- Conflict of Interest Statement detailing any conflicts of interest or potential conflicts of interest known to Respondent that exist or may exist with regard to Respondent's ability to provide the Services (including the simultaneous provision of the same or similar services to any member of YHI's Board of Directors or any entity under their control)
- Payment Address
- Proof of Insurance
- W-9 Form

NOTE: Electronic submissions to rfp@yourhealthidaho.org are subject to the May 7, 2019, 5:00 P.M. MT deadline please.

Restrictions on Communications

From the issue date of this RFQ until the Commercial Real Estate 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 RFQ Issuing Officer, Pat Kelly, 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 RFQ; or 3) YHI's decision to select a different party as the Commercial Real Estate 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 and qualifications along with a description of the functions or tasks the subcontractor(s) would perform under this RFQ must be included consistent with instructions found elsewhere in this RFQ. 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 RFQ

YHI reserves the right to amend this RFQ 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 RFQ 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 RFQ or any amendment thereto.

Cancellation of the RFQ

The RFQ 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 RFQ 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 RFQ, 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 RFQ or excuse the Respondent from full compliance with the specifications of this RFQ. 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 RFQ.

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 Commercial Real Estate 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 RFQ will be reviewed and evaluated in accordance with this RFQ.

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 engagement award, if any, shall be provided to the selected Respondent on or about the date specified in this RFQ. Such notification shall be subsequently confirmed in writing. The engagement award is subject to availability of funding and execution of a mutually acceptable engagement agreement between YHI and the Commercial Real Estate Vendor.

Neither YHI nor the State of Idaho are liable for any work, costs, expenses, loss of profits, or any damages whatsoever incurred by the Commercial Real Estate Vendor prior to the official starting date, and engagement 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 Commercial Real Estate Vendor.

Engagement Negotiation Process

Upon completion of the evaluation process, YHI may select one Respondent to be Commercial Real Estate 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 engagement 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 RFQ may protest the award of the engagement resulting from this RFQ. 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 RFQ 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 RFQ

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: 20% of score
- Relevant skills and experience: 40% of score
- Pricing and methodologies: 40% of score

The successful Respondent will provide a complete Proposal meeting the requirements of this RFQ, which may also include additional Services appropriate for the scope and subject matter of the project. The successful Respondent will have demonstrated experience in commercial real estate brokerage services.

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 must include a minimum of two (2) 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 RFQ 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 have a significant presence in Idaho.

GENERAL INFORMATION

GENERAL TERMS

This RFQ does not commit YHI to enter into an engagement, 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 engage with YHI that may be accepted by YHI in its sole discretion, subject to the execution of a mutually acceptable engagement agreement between YHI and the Commercial Real Estate Vendor. YHI reserves the right to further negotiate with Respondents to achieve the best result for YHI.

RESERVATION OF RIGHTS BY YHI

The issuance of this RFQ 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 RFQ or cancel this request with or without the substitution of another RFQ.
- 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.
- 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 RFQ and shall have the sole discretion to choose the best combination of qualification and price for the 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 RFQ.

By responding to this RFQ, each Respondent agrees that any finding by YHI regarding any fact in dispute as to this RFQ 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 RFQ, demonstrates qualifications, and provides the information requested. If the Respondent fails to provide any information requested in this RFQ, 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 RFQ shall be segregated by Respondent from the other portions of the RFQ 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.

QUESTIONS AND RESPONSE TIME

Questions or requests for clarification must be submitted by 5:00 P.M. Mountain Time (MT), April 26, 2019. 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 5:00 P.M. MT May 1, 2019, and e-mailed to respondents.

Responses to this RFQ must be received by 5:00 P.M. MT May 7, 2019, and should be sent to RFP@YourHealthIdaho.org