

**REQUEST FOR PROPOSALS**  
**for**  
**Agent Training and Support Services**

**IDAHO HEALTH INSURANCE EXCHANGE**

**dba**

**YOUR HEALTH IDAHO**

**Project:** Idaho Health Insurance Exchange - YHI

**Response Date:** By July 15, 2016

Agent Training and  
Support Services

June 24, 2016

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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 (“Respondent”) to submit a written response (“Proposal”) to this Request for Proposals (“RFP”) to provide Agent Training and Support (“Services”) to conduct system and process training for agents brokers and enrollment counselors, as well as exchange support 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 of the Contract Confirmation (attached as Attachment A) by both parties, to result in a binding agreement between YHI and Respondent (that Respondent is the Agent Training and Support 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 Agent Training and Support Services.

### **Statement of Work (SOW)**

This Section sets forth the scope of Services to be provided. Proposals may include additional Services as long as the cost for such additional Services is separately presented.

The Agent Training and Support Vendor will participate in the development and delivery of training for agents and brokers and enrollment entities throughout Idaho so that they may understand and effectively use the exchange. This includes technology training, process and procedure training, best practice discussions. Trainings will be delivered in person, by webinar and through phone support.

YHI training and agent support activities should contemplate:

- Creation of new and enhancement of existing training materials
- Delivery of in-person training in group and individual settings
- Development of certification materials
- Development of tests to determine understanding of materials
- Staff levels for in-person training
- Results tracking

Successful candidates must be able to demonstrate

- Understanding of the Affordable Care Act (ACA)
- Understanding of Your Health Idaho
- Understanding of attitudes of Idahoans in relationship to the ACA
- Understanding of Idaho Insurance Laws
- Understanding of Insurance agent and broker business requirements
- Understanding of Health Insurance Carriers business processes
- Ability to educate adult learners on the proper use of technology
- Ability to provide in person training with a minimum of two moderators per session
- Ability to supply support during times of peak exchange activity
- Understanding of Your Health Idaho stakeholder responsibilities

**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 5:00 PM on the inquiry period end date. YHI may extend the inquiry period end date.

To make an inquiry, 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](http://www.yourhealthidaho.org)) by (July 8, 2016)

**Due Dates**

All Proposals are due by 5:00 pm, MT, on Friday, July 15, 2016. 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](http://www.yourhealthidaho.org).

**Schedule of Events**

<b>Event</b>	<b>Date</b> <b>All times listed are Mountain Time (MT)</b>
1. RFP Distribution to Potential Respondents	June 24, 2016
2. Questions from Potential Respondents Due	5:00 PM., July 1, 2016
3. Responses to Potential Respondents Due (Sent electronically and posted to YHI website.)	1:00 PM, July 8, 2016
4. Proposal Due Date	5:00 PM, July 15, 2016
5. Target Date for Review of Proposal	July 29, 2016
7. Anticipated Decision and Selection of Vendor	Mid August
8. Anticipated Commencement Date of Work	September 1

## **Proposal Submittal**

Each Respondent must submit a signed copy 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 References (1 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 (e.g., Project Lead / Project Manager)
- Conflict of Interest Statement
- Payment Address
- Proof of Insurance
- W-9 Form
- Signed Independent Contractor Agreement

Additionally, please send 2 hard copies of the Proposal and a thumb drive of the Proposal to:

Your Health Idaho  
Jody Olson, Director of Communications  
1010 West Jefferson Street Suite 200  
Boise, ID 83702

NOTE: Electronic submissions to [rfp@yourhealthidaho.org](mailto:rfp@yourhealthidaho.org) are subject to the July 15, 5:00 MST deadline please.

## **Restrictions on Communications**

From the issue date of this RFP until the Agent Training and Support vendor is selected, Respondents and their representatives are not allowed to communicate with any YHI staff, Board members, staff of any agency of the state of Idaho, or other involved parties regarding this procurement except the RFP Issuing Officer, Jody Olson, or her 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 Agent Training and Support 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 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 [www.yourhealthidaho.org](http://www.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 Agent Training and Support Vendor from any contract requirement. At the 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 shall be open to public inspection after an Agent Training and Support 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**

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 Agent Training and Support 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 Agent Training and Support Vendor.

## **Contract Negotiation Process**

Upon completion of the evaluation process, YHI may select one Respondent to be Agent Training and Support 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**

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

- Scope and completeness of Proposal 10% of score
- Relevant experience and skill 40 % of score
- Idaho presence 10% of score
- Proposed contractor rate(s) and charges 30% of score
- Acceptance of terms of the independent contractor agreement set forth in Attachment B 10% 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 demonstrate a full understanding of YHI's privacy and security requirements.

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 signed copies 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 Review 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 5:00 PM Mountain Time, July 1, 2016. Questions and requests for clarification must be sent to [RFP@YourHealthIdaho.org](mailto: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 Wednesday, July 8, 2016 and e-mailed to respondents.

Responses to this RFP must be received by 5:00pm, Mountain Time, July 15, 2016 and should be sent to [RFP@YourHealthIdaho.org](mailto:RFP@YourHealthIdaho.org)

## ATTACHMENTS

### 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.

### ATTACHMENT C: PRIVACY AND SECURITY STANDARDS