



Washington Health Benefit Exchange

Request for Qualifications and Quotations
HBE 16-004

Pilot Enrollment Approach

Full Service Enrollment Center

Release Date: July 27, 2016

Responses Due: August 26, 2016

Table of Contents

1	INTRODUCTION	3
2	SCOPE OF WORK.....	4
3	EXCHANGE SUPPORT FOR ENROLLMENT CENTERS	5
5	PERIOD OF PERFORMANCE.....	6
6	COMPENSATION	6
7	INSTRUCTIONS: VENDOR RESPONSE	6
8	RFQQ RESPONSE TEMPLATE AND ATTACHMENTS	8
9	COST (Scored).....	9
10	EVALUATION AND SELECTION CRITERIA	9
11	RFQQ ADMINISTRATION.....	10

**Request for Qualifications and Quotations
Storefront Pilot Enrollment Approach
Full Service Enrollment Center
HBE 16-004**

**Released by
Washington Health Benefit Exchange
PO Box 657
Olympia, Washington 98507
RFQQ release date: July 27, 2016**

Responses Due: **August 26, 2016 4:00 p.m. PDT (electronically received)**

1 INTRODUCTION

The Washington Health Benefit Exchange (“the Exchange”) is initiating this Request for Qualifications and Quotations (RFQQ) to establish and operate one to three full service enrollment center(s) as a pilot project during all, or a portion of, the open enrollment period for 2017 health insurance coverage (November 1, 2016 through January 31, 2017.)

The Exchange will consider proposals for enrollment centers in geographic areas estimated to have higher concentrations of uninsured Washington residents who are Qualified Health Plan (QHP) eligible and where Exchange enrollment to date has been lower than expected. Those areas and the estimated number of uninsured in these areas, in priority order, include:

		Estimated uninsured in county between 139%-400% FPL*	Percent of county residents under 400% FPL who are uninsured*	2016 QHP enrollees**	2017 enrollment center goal for new QHPs
1	Pierce County/Tacoma	32,480	8%	15,000	1,500
2	Snohomish County/Everett	27,660	8%	17,000	1,700
3	Clark County/Vancouver	17,640	9%	11,000	1,200
4	Spokane County/Spokane	17,430	8%	11,000	1,100
5	Yakima County/Yakima	12,510	12%	3,700	370

*Estimates by the Washington [State Office of Financial Management](#) based on 2015 coverage data. Estimates for uninsured for Washington residents above 400% FPL is not available at this time.

**2016 QHP enrollee count is from the [2016 Exchange Enrollment Report](#).

The objective of this project is to provide the Exchange an opportunity to determine whether the enrollment center storefront approach increases QHP enrollment and renewal, reaches a broader population, and makes enrollment easier and more convenient for enrollees. Cost to operate the Center(s) compared to corresponding enrollment results will be a factor in determining the ongoing feasibility of this enrollment approach.

The Exchange will award up to three contracts as a result of this RFQQ. The successful Vendor(s) will perform the responsibilities and duties defined in Section 2, Scope of Work, throughout the term of the resulting Contract.

1.2 Exchange Background

The Exchange is a health insurance marketplace where consumers may enroll and renew coverage in individual or small-employer group coverage, and Washington Apple Health (Medicaid). The **Washington Healthplanfinder** web portal provides access to the Exchange's marketplace. The marketplace also provides consumer assistance through a Customer Support Center, licensed agents and brokers, certified navigators, and other community partners. Information is available to learn more about the [Exchange](#), as well as the Exchange's [2016 Enrollment Report](#).

1.3 Purpose

The Vendor will establish and operate a temporary Exchange health insurance storefront enrollment center. The enrollment center will be in operation during a portion of, or throughout the open enrollment period beginning November 1, 2016 and ending January 31, 2017. Consumer assistance will be delivered by knowledgeable, experienced health insurance brokers or navigators who are registered or certified by the Exchange.

1.4 Authority

The Washington Health Benefit Exchange issues this Request for Qualifications and Quotations pursuant to Chapter 43.71 RCW. Chapter 43.71 RCW is the statute that establishes the Exchange and the Exchange Board.

1.5 Who can apply?

Broker or navigator organizations registered or certified through the Exchange with at least 2 years of experience performing enrollments through **Washington Healthplanfinder** are eligible to apply.

2 SCOPE OF WORK

Under the scope of work, the Vendor will provide services and staff, and otherwise do all things necessary for or incidental to the performance of work outlined below.

2.1 Enrollment Center Site

Secure a site with adequate space for enrollment center activities throughout the duration of the pilot. The site must be a clean, safe, professional setting in an area with businesses and/or services in close proximity that result in high consumer traffic that includes people of varied income levels.

- a. The site may be an existing business location for the vendor or may be a temporary location secured for the duration of the project.
- b. Wireless internet access must be available.
- c. Adequate privacy for meeting with consumers one-on-one who are enrolling in coverage.
- d. The site must be in close proximity to public transportation and be physically accessible for individuals with disabilities.
- e. The Exchange will provide display banners, posters, logos and other items to identify the site as a *Washington Healthplanfinder* enrollment site. The Vendor will also place Exchange marketing and education material in prominent locations for consumer use.

2.2 Enrollment Center Operations and Staff

The Vendor will manage daily operations of the enrollment center, including staffing, to ensure sufficient assistance is available during hours of operation. The Vendor must anticipate and provide adequate staffing during peak enrollment activity related to enrollment deadlines.

- a. Both navigators and brokers may be used for staffing consumer assistance and/or consumer education activities.
- b. Broker organizations acting as enrollment center operators are encouraged to engage certified Navigator organizations or other broker organizations to participate in enrollment center activities.
- c. An enrollment center operated by a navigator organization is encouraged to establish one or more broker partnerships using a broker selection process that is fair and equitable. Broker partners must commit in advance, including the number of brokers to be assigned and the number of hours per week they will commit to the pilot site.

2.3 Enrollment Center Hours of Operation

Enrollment centers will establish and post regular business hours, generally reflecting the customary hours of surrounding businesses. Evening and weekend hours are expected, as needed, to meet enrollment demand of those who need assistance outside regular business hours. Enrollment centers will also be open extended hours to accommodate key enrollment deadlines. Enrollment centers will accommodate consumers who walk in and those who schedule appointments in advance throughout the duration of the pilot.

2.4 Required Services

The following services will be delivered at enrollment centers:

- a. Answer consumer questions about enrollment through **Washington Healthplanfinder**.
- b. Assist individuals to complete an application and receive eligibility results.
- c. Explain eligibility results and all plan options, and facilitate plan selection and enrollment in Qualified Health Plans, Qualified Dental Plans and Washington Apple Health.
- d. Assist individuals with health insurance coverage renewals.
- e. Update accounts for individuals reporting changes.
- f. Answer questions and assist individuals to enroll in new dental plan options.
- g. Offer consumer health insurance education resources.

2.5 Optional enrollment center services

The following optional services are encouraged, but not required. Responses will be scored and scores will count toward overall proposal evaluation.

- a. Flat screen television looping videos (Exchange to supply videos) in waiting/self-serve area.
- b. Health insurance literacy workshops. Content and material to be provided by the Exchange.
- c. Ability to assist consumers in languages other than English.

3 EXCHANGE SUPPORT FOR ENROLLMENT CENTERS

The Exchange will support enrollment centers as follows:

- a. Designate a project manager to coordinate with the Vendor throughout the pilot project.
- b. Refer potential QHP consumers to enrollment centers through marketing, consumer communication, and leads generated from **Washington Healthplanfinder**.
- c. Access to system and user support related to **Washington Healthplanfinder** issues.
- d. Local advertising/marketing in cooperation with Vendor (signage, radio, weeklies, earned media)

- e. Print/video material, including marketing and consumer education items.
- f. Technical assistance and support to address unexpected needs or issues.
- g. Assistance with costs related to operations (see Section 6, Compensation).

4 DELIVERABLES

Prior to November 1, 2016, the operator will provide weekly activity and progress report using a reporting tool provided by the Exchange. Beginning November 1, 2016, the operator will submit weekly activity reports using a format and timeline established by the Exchange.

5 PERIOD OF PERFORMANCE

Enrollment center preparation and set-up may begin in October 2016 and the enrollment center will be open for business between November 1, 2016 and January 31, 2017. Vendors may propose to operate the enrollment center throughout the full open enrollment period or may propose operating the enrollment center for a portion of the open enrollment period. If a vendor proposes operating an enrollment center for only a portion of the open enrollment period, preference is given to enrollment centers proposed during December 2016 and January 2017.

6 COMPENSATION

Vendors will submit bids for the entire project. Costs related to the project should include costs to the vendors that are **over and above** their usual costs of business. Maximum compensation available per enrollment center is **\$50,000**.

7 INSTRUCTIONS: VENDOR RESPONSE

- a. Vendor proposals must be submitted using the Enrollment Center application packet and the templates therein that accompanies this proposal.
- b. Late responses will not be accepted and will automatically be disqualified from further consideration. Provide the information in the order and manner described herein. Responses must provide complete, concise information regarding the Vendor’s experience and ability to provide the services required.

c. RFQQ Coordinator and Submission of Response

Coordinator: Kathy Krulich
 Responses Due: **August 26, 2016 – 4:00 p.m. PDT (electronically transmitted)**
 Delivery Method: E-mailed to kathy.krulich@wahbexchange.org

Please provide the response in unrestricted Microsoft Word or Excel software. The email subject line should clearly indicate the response is for Exchange RFQQ HBE 16-004.

d. Schedule

THE EXCHANGE reserves the right to revise this schedule at any time.

Item	Action	Due Date
1	Exchange issues RFQQ	July 27, 2016

2	Vendors may submit written questions about the RFQQ until 3:00 p.m. PDT	August 5, 2016
3	Exchange issues written responses in an Addendum by 5:00 p.m. PDT	August 11, 2016
4	Vendors RFQQ application packet due by 4:00 p.m. PDT	August 26, 2016
5	Exchange completes response evaluations	September 9, 2016
6	Oral presentations should the Exchange opt to hold oral presentations	September 12-16, 2016
7	Exchange notifies Apparent Successful Vendor (ASV) and begins contract negotiations. Non-ASV's may request a debriefing within 5 business days of ASV notice.	September 21, 2016
8	Vendor optional debriefings	September 28-30, 2016
9	Contract execution	By November 1, 2016

8 RFQQ RESPONSE TEMPLATE AND ATTACHMENTS

a. Organization Information (Mandatory)

1. Company name, including DBA (legal business name)
2. Legal status (e.g. corporation, sole proprietor, etc.);
3. Company street address
4. Federal Identification Number; Washington UBI Number
5. Company contact name
6. Contact telephone number; Email address
7. Name of individual authorized to legally bind the Vendor to a contractual relationship, e-signature, and date

b. Experience of Accountable Person (Mandatory)

The accountable person for the Contract awarded through this RFQQ must have the following experience:

1. Experience managing a contract, project, or program of similar size and scope.
2. Two or more years' experience working for the organization named in the application.
3. Strong knowledge of the Affordable Care Act and Health Benefit Exchange operations.
4. Strong knowledge related to Qualified Health Plans, health insurance premium tax credits, and Washington Apple Health coverage.
5. Strong knowledge related to enrollment through **Washington Healthplanfinder**; and/or experience supervising Exchange registered brokers or certified navigators.

c. Enrollment Center Site and hours of operation (Scored)

1. Location
2. Length of time the Vendor has delivered services in this service area.
3. Length of time the Vendor has been located at this site (if using an existing site).
4. Describe the neighborhood surrounding the site, including businesses that are adjacent to or in close proximity to the site.
5. Describe the reasons you feel this site will attract a large number of consumers from various income level, particularly those eligible for QHPs.
6. Submit internal and external photos depicting storefront visibility from the main paths of consumer travel, parking availability, internal customer service areas (reception, one-on-one counseling, etc., self-serve area, etc.)
7. Enrollment Center scheduled days/hours of operation and ability to maintain availability outside regular business hours.

d. Organization/partner experience (Scored)

Brief summary of experience and qualifications for the Vendor's and/or partner's organization staff who would oversee and/or deliver services at the enrollment center and would perform the enrollment center services described herein.

1. Name (if known), title, and duties to be performed by each representative at the enrollment center.
2. Education, professional licenses, Exchange registration/certification.
3. Length of time as an Exchange registered broker or certified Navigator.
4. Specific or unique skills, such as languages other than English that team members are competent to speak, sign language interpretation, Exchange navigator-enhanced user, financial counseling, tax accounting or tax preparation, or other pertinent skills.

5. Experience providing enrollment services to **Washington Healthplanfinder** QHP consumers.
 6. Experience providing enrollment services to Washington Apple Health consumers.
 7. The delivery of insurance and/or financial services are the organization's primary service or business.
 8. Two References relevant to this effort will be provided, including: contact name, phone number, and email. The Vendor grants permission to the Exchange to contact the references and others who may have pertinent information. References will be checked at the option of the Exchange. References may not be provided by partners who will be involved in the operation of the Enrollment Center.
- e. Capacity of the Vendor (Scored)
- Enrollment Center capacity to deliver services, including:
1. Other types of public or professional services delivered by the Vendor.
 2. Number of enrollment center representatives assigned to the enrollment center and number of hours per week each representative would work.
 3. Number of enrollment center representatives available at any given time of day.
 4. Partner organizations or individuals who have committed to the pilot and number of hours per week they have agreed to be available.
 5. Estimated enrollment capacity during the pilot.
 6. Organization's volume of QHPs and Washington Apple Health enrollments since beginning to enroll through **Washington Healthplanfinder**.
 7. Partner organization experience enrolling individuals in QHP and Washington Apple Health (if using partners).

9 COST (Scored)

Vendor will provide a not-to-exceed bid for the full cost of operating the enrollment center using the not-to-exceed worksheet included in the application packet. The bid shall include all costs for which the Vendor is seeking compensation from the Exchange and may include categories for rent/lease of temporary site, equipment, internet services, and other (to be defined by Vendor). Costs should be **over and above** the Vendor's usual operating expenses. Maximum contract award per enrollment center is \$50,000.

The Exchange will evaluate the QHP enrollment potential as well as the cost of operation in its scoring of Vendors.

10 EVALUATION AND SELECTION CRITERIA

The Exchange will evaluate Vendor responses as outlined on the application template. The Exchange will assign scores based upon a Vendor's responses on the application template. The Exchange reserves the right to check all references and may choose to contact references only for the Vendor with the top score.

The Exchange may select the Apparently Successful Vendor based on the scored results on the application template or at its sole discretion, may select the top scoring finalist(s) for an oral presentation. Evaluators will score the oral presentation(s) the Exchange may award the Contract based solely on the oral presentation.

SCORE	
REQUIREMENTS/CRITERIA	
Mandatory criteria	<i>Pass/Fail</i>
	WEIGHT ASSIGNED
Organization's Healthplanfinder enrollment experience	30%
Organization's capacity and resources	20%
Storefront site	30%
Cost	20%
TOTAL	100

11 RFQQ ADMINISTRATION

a. Communications Only Through the RFQQ Coordinator
 Unauthorized contact regarding this solicitation with any other Exchange employee may result in disqualification. The RFQQ Coordinator and authorized Exchange employee for RFQQ inquiries and submissions is Kathy Krulich, HBE Navigator Program. Email: kathy.krulich@wahbexchange.org

b. Vendor Questions and Exchange Answers

Vendor questions regarding this RFQQ will be accepted until the dates and times specified in RFQQ Section 7.d Schedule. Early submission of questions is encouraged. Vendor questions must be submitted in writing via e-mail to the RFQQ Coordinator at the email address listed below.

Kathy Krulich, Navigator Program Contracts Coordinator
 RE: Exchange RFQQ 16-004
 Email: kathy.krulich@wahbexchange.org

The Exchange's official written answers to the Vendor's questions will be posted to the Exchange's procurement webpage <http://www.wahbexchange.org/about-the-exchange/what-is-the-exchange/vendor-procurements/> as an addendum. Please check both resources regularly for RFQQ updates, amendments and other addenda.

Only written responses posted to the Exchange's procurement webpage will be considered official and binding.

Vendors are requested to use the following format when submitting their written questions:

Question #	Document Name	Section # and Title	Page or Paragraph#	Question

c. Optional Debriefing

After the Exchange releases the name of the Apparently Successful Vendor (ASV), vendors who submitted a response but were not selected as an ASV, will be given the opportunity for a telephone debriefing conference, if requested. The request must be made in writing (email acceptable) and received by the RFQQ Coordinator within five business days after notification

of the ASV. A debriefing will be scheduled within two business days of the request. The debriefing will be limited to a review of the requestor's response only.

d. RFQQ Amendments

The Exchange reserves the right to amend this RFQQ. Amendments and all communications regarding this RFQQ will be posted to the Exchange procurement webpage.

If a conflict exists between amendments, or between an amendment and the RFQQ, the document issued last shall take precedence. The published Vendors' questions and the Exchange's official answers are an addendum to the RFQQ.

e. Protest Procedures

The Exchange Protest Procedures are detailed in Appendix B Protest Procedures.

f. The Exchange's Right to Cancel

The Exchange reserves the right without penalty to cancel this RFQQ at any time, reject any and all responses received, or not to execute a Contract from this RFQQ. The release of this RFQQ does not obligate the Exchange to contract for the services specified in this RFQQ. The Exchange shall not be liable for any costs incurred by a Vendor in preparation of a proposal submitted in response to this RFQQ, or any activity related to responding to this RFQQ.

g. E-mail

E-mail is to be used for all communications required in this RFQQ. The Exchange may also communicate with the Vendor utilizing the same methods. THE Exchange will also post any formal communications to the Exchange procurement webpage.

The Exchange does not take responsibility for any problems in the e-mail or Internet delivery services, either within or outside the Exchange. The Vendor is responsible for ensuring timely and complete delivery of any communications related to this RFQQ.

h. Contractual Requirements

To be responsive, vendors must indicate a willingness to enter into a Contract subject to the Exchange standard terms and conditions, Appendix C – Contract Terms and Conditions (sample), by signing Appendix A Certifications and Assurances.

i. Errors in Response

HBE is not liable for any errors in vendor responses. Vendors will not be allowed to alter response documents after the response due date. Vendors are liable for all errors or omissions contained in their responses. Corrections to the response submitted prior to the due date must include the agency name and must reference the RFP section number, title and page number of the vendor application where it is to be inserted.

j. Waive Minor Administrative Irregularities

HBE reserves the right to waive minor administrative irregularities contained in any vendor response. Additionally, HBE reserves the right, at its sole option, to make corrections to a vendor's response when an obvious arithmetical error has been made in the price quotation. Vendors will not be allowed to make changes to their quoted pricing after the response submission due date.

k. Order of Precedence

If any provision of this RFP shall be deemed to be in conflict with any statute or rule of law, such provisions shall be deemed modified to conform to said statute or rule of law. In the event of inconsistency in any other documents related to transactions executed pursuant to the RFP, the inconsistency shall be resolved in the order of precedence stated below:

1. Applicable federal and state statutes, laws, and regulations
2. Appendix A Certifications and Assurances
3. The Terms and Conditions of this RFQQ
4. Appendix C – Sample Contract Terms and Conditions
5. Any statement of work issued as a result of this RFQQ
6. The vendor's response to this RFQQ

I. Publicity

The apparently successful vendor agrees to submit to HBE all advertising, sales promotion, and other publicity matters relating to any products and services furnished by the vendor wherein HBE's name is mentioned or language used from which the connection of HBE's name therewith may, in HBE's judgment, be inferred or implied. The vendor further agrees not to publish or use such advertising, sales promotion, or publicity matter without the prior written consent of HBE.

m. Washington State Sales Tax

Vendors responding to this RFQQ must be registered with the Washington State Department of Revenue and must collect and report all applicable state taxes, including the Washington State sales tax as prescribed by law.

n. Cost of RFP Response Preparation

HBE will not reimburse vendors for any costs associated with the preparation and submission of a vendor's response to this RFP.

o. Best and Final Offer

HBE reserves the right to make an award without further discussion of the response submitted; there will be no best and final offer procedure. Therefore, the response should be initially submitted on the most favorable terms that the vendor can offer.

p. Response Property of HBE

All materials submitted in response to this RFP become the property of HBE. HBE has the right to use any of the ideas presented in any response to the RFP. Selection or rejection of a response does not affect this right.

q. Proprietary or Confidential Information

Any vendor's information contained in the response that is proprietary or confidential must be clearly designated. Marking of the entire response or entire sections of the response as proprietary or confidential will neither be accepted nor honored. HBE will not accept responses where pricing is marked proprietary or confidential.

To the extent consistent with Chapter 42.56 RCW Public Disclosure Act, HBE shall maintain the confidentiality of vendor's information marked confidential or proprietary. If a request is made to view a vendor's proprietary information, HBE will notify vendor of the request and of the date that the records will be released to the requester unless the vendor obtains a court order enjoining that disclosure. If the vendor fails to obtain the court order enjoining disclosure, HBE will release the requested information on the date specified.

Appendices:

Appendix A: Certifications and Assurances

Appendix B: Protest Procedures

Appendix C: Sample HBE Contract Terms and Conditions