



**Washington Health Benefit Exchange  
RFR HBE 21-006  
State Subsidy Program Project & Change Management Services  
Addendum No. 01**

June 30, 2021

**TO:** Potential Bidders for RFR HBE 21-006  
**FROM:** Erin Hamilton, RFR Coordinator  
**SUBJECT:** Addendum No. 1 to RFR HBE 21-006 “*State Subsidy Program Project & Change Management Services*”  
**PURPOSE:** To provide responses to Vendor questions submitted by the June 25, 2021 deadline

**ATTACHMENTS:** Exhibit A – Vendor Questions and WAHBE Responses

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WAHBE responses to Vendor questions are provided as Exhibit A to this Addendum.

Please contact the RFR Coordinator at [contracts@wahbexchange.org](mailto:contracts@wahbexchange.org) if there are any questions concerning this Addendum.

Respectfully,

A handwritten signature in blue ink that reads "Erin Hamilton".

Erin Hamilton, CPPB, NIGP-CPP  
RFR Coordinator  
[contracts@wahbexchange.org](mailto:contracts@wahbexchange.org)

## Exhibit A Vendor Questions and WAHBE Responses

#	Vendor Question	WAHBE Response
1.	Is the vendor that performs Financial and Programmatic Audits for WAHBE eligible to propose on this RFR?	Yes.
2.	How does WAHBE define “key” for the purposes of responding to the second bullet point in the “conflict of interest information” section? Would it be appropriate for us to interpret “key” in this context to mean any employees who might be involved in project work?	Yes, vendors should interpret “key” staff to mean any employee directly involved in delivery of project services and deliverables.
3.	<p>A. Will WAHBE please confirm that reference to “HPS” in Deliverable 7 (open enrollment go-live readiness assessment) is in error, i.e., it should be HPF?</p> <p>B. Can WAHBE also please confirm that the assessment is focused on implementation of the subsidy (e.g., independent testing of system business rules and user functionality based on approved user stories), not all open enrollment functions?</p>	<p>A. Yes, HPS is a typographical error, and the correct acronym is HPF, Washington HealthPlan Finder.</p> <p>B. Yes, scope of work is focused on system changes, business processes and enrollment functionality related to the state subsidy implementation. Other open enrollment concerns and topics will be addressed through other workstreams outside this scope of work.</p> <p>For additional consideration, roll out of this functionality is anticipated to occur in tandem with Open Enrollment, thus tasks and deliverables will need to align for successful implementation.</p>
4.	Would WAHBE like vendors to respond to each of the prompts in Section 5, A-G in separate documents (7 total)? Or is it acceptable to WAHBE if vendors submit our responses to Section 5, A-G in one document, with separate sections dedicated to our response to each prompt?	WAHBE has no preference. It is acceptable for vendors to submit responses to Section 5, A-G, either separately or in one document with separate sections dedicated to the response to each prompt.

#	Vendor Question	WAHBE Response
5.	I am interested in understanding how the cost proposal for this RFP will be evaluated and how the reimbursement for services provided. Is the evaluation on the cost per deliverable or on the hourly rate? Is the contract reimbursed monthly based on the hours expended or upon approval of each deliverable?	<p>The cost evaluation is based on the deliverable pricing, not the hourly rates, proposed by vendors.</p> <p>Payments to the vendor will be made upon approval of deliverables. However, WAHBE will consider negotiating milestone payments for certain deliverables with the selected vendor.</p>
6.	In order to accurately prepare my bid, can you please advise what you anticipate the expectation to be for onsite service delivery vs. remote management of the project? I would like to plan for how this expectation may or may not change for the duration of the project.	<p>We anticipate that the majority of work would be completed virtually or remote. There may be a few in person meetings that attendance in person would be preferred and can be discussed as COVID protocols evolve.</p> <p>Currently all WAHBE meetings and work is virtual and remote. At this time, there is not a definitive plan or timeline for opening the building for on site meetings and work.</p>
7.	Does WAHBE have an expectation as to the number of stakeholder meetings that respondents are expected to facilitate? If so, could WAHBE please share that number?	The Project Plan will confirm the identified stakeholder groups, and the Stakeholder Plan will confirm the number of meetings, but at this point we assume that there would be 3 or 4 stakeholder meetings. If more than 4 meetings are requested, WAHBE and selected vendor will negotiate changes to the contract.
8.	Would WAHBE allow us to provide additional information beyond what is specifically asked for in section 5 of the RFR (e.g., a project team organizational chart) in our proposal response, or does WAHBE prefer that respondents address only the specific prompts and questions included in this section?	You may include additional information within the page limits for that response.

#	Vendor Question	WAHBE Response
9.	<p>Please clarify what is meant for Deliverable #7 Open Enrollment Go-Live Readiness- is it a report? Or would WAHBE like this deliverable to include the include the Vendor's time for implementation, controlling and monitoring of the plans specifically #1- Project Plan, #2- Stakeholder Plan, #4 Communications Plan and #5 Employee &amp; Biz Operations Change management plan which leads to the Go-Live Readiness?</p> <p>For example: Deliverable #2- Reporting Structure is the plan; and #6-Project Updates is the project implementation, controlling and monitoring of the Reporting Structure plan on a monthly basis for the entire project.</p>	<p>#6, Open Enrollment Go-Live Readiness deliverable would entail a project checklist, that tracks all tasks and risks for the implementation of the State Subsidy project. This deliverable would be a review of the project checklist at an interval to be determined between the vendor and the Executive Sponsors, but no less than monthly. (This deliverable could be billed in portions that align with the interval agreed to).</p> <p>The final approval of this deliverable and project checklist would look much like a "go-no go" with approval from the Executive Sponsors for this Project, Carla Reyes and Leah Hole-Marshall.</p>
10.	<p>Depending on your response for #9 above, In the Cost Proposal table Section 5G, should there be a separate line item for the Vendor time and attention towards the implementation of all plans until Go-Live (between the period of 12/1/2021 and 10/31/2022)?</p>	<p>WAHBE anticipates that the Vendor time to support the ongoing implementation of the project outside of specific plan deliverables would be billed in Deliverable #6. WAHBE will also consider negotiating milestone payments for certain deliverables with the selected vendor.</p>
11.	<p>Please confirm the sample contract (Exhibit D, Section 4B) allows for progress billings on the deliverables (not more than monthly)?</p>	<p>While the current sample contract does not specify progress billings/milestone payments, WAHBE will consider negotiating milestone payments for certain deliverables with the selected vendor.</p>
12.	<p>Once COVID restrictions are lifted, how often will vendor change management team members be expected to be onsite?</p>	<p>We anticipate that the majority of work would be completed virtually or remote. There may be a few in person meetings that attendance in person would be preferred and can be discussed as COVID protocols evolve.</p> <p>Currently all WAHBE meetings and work is virtual and remote. At this time, there is not a definitive plan or timeline for opening the building for on-site meetings and work.</p>

#	Vendor Question	WAHBE Response
13.	How many trips and days of travel are expected?	We anticipate that the majority of work would be completed virtually or remote. However, there may times where an in-person stakeholder meeting is preferred. While there is not a defined number of such visits identified, there could be at least 2 to 3 meetings in Olympia to attend in person. If more than 3 meetings are requested, WAHBE and selected vendor will negotiate changes to the contract.
14.	What hours should contractors be available to work?	WAHBE business hours are 8:00 a.m.to 5:00 p.m. Monday – Friday. Vendor must be available to provide services within those hours. WAHBE does not anticipate this project to require full time (40 hours per week) work.
15.	If proposed staff needs to change, what is the protocol?	WAHBE's process is outlined in RFR Exhibit D – <i>Sample Contract</i> , Exhibit B – <i>Statement of Work Template</i> , Section 5.A. – <i>Assignment of Staff</i>

#	Vendor Question	WAHBE Response
16.	<p>What is the role of the Subsidy Implementation Team and what skillsets do those team members have (Trainers? Change experts? Evaluators)?</p>	<p>The Subsidy Implementation Team will be the guiding body for this project. There are representatives from each department on the team.</p> <p>Executive Sponsors:</p> <ul style="list-style-type: none"> <li>• Carla Reyes, Chief Operating Officer</li> <li>• Leah Hole-Marshall, General Counsel and Chief Strategist</li> </ul> <p>Team Members:</p> <ul style="list-style-type: none"> <li>• Evan Klein, Policy Analyst bringing Legislative knowledge, rules and regulations</li> <li>• Stacey Scott, Deputy Director of Operations, bringing operational, business and customer service knowledge</li> <li>• Jon Rambo, Business Systems Analyst Manager, bringing system knowledge, system business functionality and agile leadership</li> <li>• Addie Gray, Associate Director of Finance, brining financial rules and process knowledge</li> <li>• Hy Quach, IT Development Manager, bringing system knowledge and IT best practices</li> <li>• Chantelle Butler, Digital Design Manager, brining user interface knowledge and HPF functionality</li> </ul> <p>Other expertise will be pulled into the project as needed from within the organization.</p>

#	Vendor Question	WAHBE Response
17.	<p>A. For the Open Enrollment and Go-Live Readiness deliverable, could you describe the requirements (e.g., system development, testing, training tools, standard operating guidance)?</p> <p>B. Does this go-live support require the vendor to perform any programming?</p>	<p>A. #6, Open Enrollment Go-Live Readiness deliverable would entail a project checklist, that tracks all tasks and risks for the implementation of the State Subsidy project. This deliverable would track elements including, but not limited to:</p> <ul style="list-style-type: none"> <li>• HPF system changes,</li> <li>• testing,</li> <li>• releases ready for deployment,</li> <li>• training developed to support the release,</li> <li>• business and operational teams ready,</li> <li>• communications and outreach,</li> <li>• auxiliary systems, (Call Center customer service, CSA-account worker tool)</li> <li>• carrier partners tested and ready,</li> <li>• financial processes established and ready,</li> <li>• ongoing program monitoring ready,</li> <li>• other items as determined during the project plan development.</li> </ul> <p>B. The Vendor will not be responsible for programming. WAHBE has a contracted System Integrator for Washington HealthPlan Finder (HPF) and technical teams (contract and staff) that support all auxiliary systems.</p>

#	Vendor Question	WAHBE Response
18.	<p>For Item 5.F Response Deadline and Criteria, Experience and Qualifications:</p> <p>For clarification purposes, in addition to a 2-page resume per bid individual, there are 2 additional pages for staff experience and 2 additional pages for Preferred Skills and Quals. Is that correct?</p>	<p>Yes, WAHBE expects the vendor's response to include up to 6 pages, including all of the following:</p> <ul style="list-style-type: none"> <li>• 2 pages or less for Vendor's proposed Project and Change Management staff resume(s).</li> <li>• 2 pages or less to describe the proposed Project and Change Management staff's experience directly managing or advising at least two (2) similar projects within the last five (5) years.</li> <li>• 2 pages or less to describe how the proposed Project and Change Management staff meet any of the Preferred Skills and Qualifications listed in Section 2. B.</li> </ul>
19.	<p>What is the difference between the Core Implementation Team and the Subsidy Implementation Team?</p>	<p>There is no difference. The Core Implementation Team and the Subsidy Implementation Team are the same group of staff that will support this project.</p>
20.	<p>What is the proposed technical solution for this project?</p>	<p>WAHBE will enhance existing technology platforms, to provide functionality to support this new State Subsidy program, to include HPF, WA Plan finder, CSA, and other auxiliary tools and systems to be defined as part of project planning.</p>
21.	<p>What change management framework(s) is WAHBE familiar with or has utilized on previous projects?</p>	<p>The WAHBE organization has deep experience with Lean methodologies, and limited familiarity with Prosci. WAHBE is open to whichever methodology is the Vendor's preference for use.</p>



#	Vendor Question	WAHBE Response
22.	Are there in-house resources to support the Project Manager/Change Manager, i.e., project coordinator, administrative support, project management methodology?	WAHBE expects the vendor to serve as both the Project Manager and Change Manager. This includes tracking progress and risks that inform successful delivery of the overall program. There is administrative support available, as well as IT system development teams that have existing Agile Scrum processes. We expect IT development will follow those existing practices. We don't expect this position to manage the IT Agile scrum processes. However, the position will need to coordinate deliverables and timelines from those processes to manage the project and monitor progress.
23.	Is there an established executive steering committee for the project?	Yes, Carla Reyes, Chief Operating Officer and Leah Hole-Marshall, General Counsel and Chief Strategist are the Executive Sponsors for the project and will serve as the Executive Steering Committee.
24.	Will WAHBE reconsider not offering debriefs for interested vendors after award?	Yes, WAHBE will consider providing debriefs to responding vendors after award. Optional debriefings will not include any comparison between Vendor's response and any other responses submitted. However, WAHBE will discuss the factors considered in the evaluation of the requesting Vendor's response and address questions and concerns about Vendor's performance with regard to the RFR requirements. The debriefing conference may take place via Microsoft Teams or by telephone and will be up to 15 minutes in length.