

Policy Level

Agency:

107 Health Care Authority on Behalf of the Health Benefit Exchange

Decision Package Code/Title:

PL-ME HBE CSC and SI Procurement Costs

Agency RecSum:

Funding for costs associated with procuring a customer support center vendor and the system integrator to support the Healthplanfinder (HPF) maintenance and operations activities and enhancement services.

Fiscal detail:

Operating Expenditures	FY 2026	FY 2027	FY 2028	FY 2029
001-1 GF-State	\$11,000	\$9,000	\$2,000	\$0
17T-1 HBEA	\$295,000	\$258,000	\$52,000	\$0
001-C GF-Federal	\$1,105,000	\$962,000	\$196,000	\$0
Total Expenditures	\$1,411,000	\$1,229,000	\$250,000	\$0
Biennial Totals	\$2,640,000		\$250,000	
Staffing	FY 2026	FY 2027	FY 2028	FY 2029
FTEs	2.0	2.0	0.0	0.0
Average Annual	2.0		0.0	
Object of Expenditure	FY 2026	FY 2027	FY 2028	FY 2029
Obj. C	\$1,411,000	\$1,229,000	\$250,000	\$0
Revenue	FY 2026	FY 2027	FY 2028	FY 2029
001-0393 GF-Federal	\$1,105,000	\$962,000	\$196,000	\$0
Total Revenue	\$1,105,000	\$962,000	\$196,000	\$0
Biennial Totals	\$2,067,000		\$196,000	

Package Description

What is the problem, opportunity or priority you are addressing with the request?

The Exchange operates the Washington Healthplanfinder (HPF) – an easily accessible, online marketplace for individuals and families to compare and enroll in Washington Apple Health (Medicaid) and individual market Qualified Health (QHP) and Qualified Dental (QDP) Plans).

The Exchange is required to competitively solicit its vendors periodically per Federal Uniform Guidance requirements for the Washington Apple Health (Medicaid) program. The Exchange’s two largest contracts will be reaching their contract terms in FY2027 and FY2028, with no additional

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options to extend. Those contracts are the customer support center (CSC), which is the call center located in Spokane and Healthplanfinder's system integrator.

The call center or customer support center (CSC) supports the Exchange by helping customers navigate HPF, answering questions about eligibility and enrollment and providing other customer service functions.

The CSC contract was last reprocured in FY2019 with the contract's period of performance being FY2019 through FY2022. In FY2023, the Exchange exercised its option to extend the contract through FY2027.

Customer service strategies, services and technologies are shifting rapidly. Selecting a call center partner is a lengthy process, and the resulting outcome has a major impact on how the Exchange can serve customers with varied and complex needs.

The Exchange's system integrator (SI) contract for Healthplanfinder (HPF) was last reprocured in FY2019 with the contact's period of performance being FY2020 through FY2025. The Exchange will exercise our option to extend the contract through FY2028.

The Exchange continuously improves how Washingtonians secure health insurance through innovative and practical solutions and an easy-to-use customer experience. As the single point of entry for Washington Apple Health, QHP and QDP, the Exchange serves more than 1.8 million residents annually.

Investments are necessary to ensure that outsourcer services and Exchange hosted technologies result in maintaining and improving the customer experience.

What is your proposal?

This decision package requests one-time expenditure authority to cover the procurement related costs for the Exchange's customer support center and system integrator contracts.

Technical assistance is requested for a contractor to assess the Exchange's customer support center and system integrator current functionality and define requirements for the Request for Proposal solicitation process. Consistent with past budgeting practice for the Exchange, any cost changes for large newly procured contracts and re-procurements will be requested for the 2027-29 biennium when the full scope of costs will be known. It is likely that federal participation in the costs for re-procurement of these contracts will be high and help amplify the state's investments.

Customer Support Center procurement

The current vendor contract started in 2020 with terms that allowed up to five 12-month extensions. The current contract will need to be competitively re-procured before June 30, 2027. Any transition to a new customer support center vendor would require a go-live date on or before September 1, 2026. The Exchange is intentional about putting customers first and provide technology, strategies, and processes to meet changing needs and customer expectations.

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Dedicated resources for the CSC procurement coupled with call center expertise and experience, will include project management to support the ongoing procurement activities and overlapping existing call center services until outdated services are decommissioned.

The customer support center resources will:

- Provide continuity for project services for the RFP underway.
- Provide readiness to optimize CSC data usage to reduce performance gaps, such as first contact resolution strategies.
- Provide CSC team business lead support for the procurement.

System Integrator Procurement

The System Integrator contract for *Washington Healthplanfinder* will expire June 30, 2028. To prepare for this procurement, the Exchange requires a System Integrator Procurement contractor to identify the technical requirements of the Request for Proposal (RFP) for the system integrator and assist in the implementation of a new vendor (if needed). The RFP is intended to solicit proposals from qualified vendors to provide maintenance and operations (M&O) as well as system enhancements for the Healthplanfinder beginning January 1, 2028.

This request establishes the funding authority needed to assist the Exchange with the procurement process. The system integrator procurement contractor will:

- Provide project management services for the RFP process
- Conduct research on market comparisons, performance guarantees and scoring;
- Evaluate the scope of potential services by the system integrator and identify alternate solutions for specific products or services
- Develop technical requirements and scoring criteria to evaluate RFP responses.

What are you purchasing and how does it solve the problem?

The Exchange will engage a procurement consulting firm that is experienced in the solicitation for IT system integrator services and provide a comprehensive set of services to ensure that all aspects of the procurement and future contract and statement of work. This will include market analysis and outreach, requirements elicitation and documentation, RFP development and evaluation and contract negotiations. The firm may also be leveraged to assist in managing the transition to a new system integrator, should a new one be selected.

Additional services may require:

- Project management: to provide strong project management capabilities to oversee the procurement process, including developing a detailed project plan, setting timelines, coordinating with internal and external stakeholders, and ensuring all activities are completed on schedule. They will also be responsible for risk management and keeping the procurement process on track.

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- **Market analysis and outreach:** to work in partnership with the Exchange’s contract/procurement, business, and technical staff to conduct a thorough market analysis. The vendor should have the capability to perform market research to identify potential system integrators and industry trends. Additionally, they should reach out to other organizations to gather insights on structuring the procurement, contract and statement of work.
- **Requirements documentation:** for documenting both technical and non-technical requirements is essential. The procurement consulting firm will provide systems analysis and business analysis services to gather and articulate these requirements. This includes defining service level expectations, documenting the systems and technologies the integrator will manage, and outlining future roles and responsibilities for both the system integrator and the Exchange.
- **RFP development and evaluation:** to assist in writing the Request for Proposal (RFP). The vendor will work closely with the Exchange contracts and procurement team and help draft a comprehensive RFP that clearly outlines the Exchange’s needs and expectations. As well as assist in coordinating the review process, providing expertise to assess, score, rank, and select the best system integrator.
- **Technical Leadership:** to provide technical leadership to guide the selection process and ensure that the chosen system integrator has the required technical expertise. This involves evaluating the technical aspects of proposals and ensuring they align with the Exchange’s needs and future goals.

The customer support center serves 1.8 million Washingtonians. Providing clear requirements, continuity through procurement to implementation and ongoing vendor performance management to implementation and ongoing vendor performance management means stronger procurement and fair selection process and drives satisfaction for customer experience services over the life of the vendor contract for call center services and other related contracts.

- Lead the Exchange’s team for RFP evaluations, scoring and ASV selection process.
- Lead communication during the transition activities.
- Coordinate transition activities with the ASV project management team.
- Provide support to Exchange staff during intense periods of ongoing operations and overlapping critical focus on implementation activities.
- Responsible for creating a Call Center Services Roadmap to transform customer experiences and creates a framework and timeline for services to be handled in-house and others outsourced per the published RFP.

What alternatives did you explore and why was this option chosen?

The Exchange is required to competitively solicit its vendors periodically per Federal Uniform Guidance requirements. The base budget does not include funding to administer the federally required solicitation of our major contracts or the one-time call center or system integrator startup costs or overlapping transition costs with the existing vendors.

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What resources does the agency already have that are dedicated to this purpose?

The Exchange is not funded to support these major procurements that only occur every 5-10 years. The customer support center was last procured in 2018-2019 and Healthplanfinder's system integrator contract was procured in 2018-2019.

- 2018 Supplemental: PL-HG HBE Call Center and System Integrator Procurements
 - Onetime Funding for Customer Support Center Procurement
 - Infrastructure Ramp-up Costs
 - Staffing and
 - Training Ramp-up Costs
 - Consultant for project management and Requirements Gathering
 - Onetime funding to System Integrator Procurement planning
 - Consultant project management and Requirements Gathering
- 2019-21 Biennial: PL-H4 HBE System Integrator Reprocurement
 - Onetime Transition activities
 - Quality Assurance
 - M&O transition overlap
 - Consultant
 - Additional HBE staff Support

How is your proposal impacting equity in the state?

Please describe in detail how this proposal is likely to benefit communities and populations who have historically been excluded by governmental decisions. Include both demographic and geographic information about communities.

The customer support center provides enrollment assistance to all our customers, including historically marginalized communities, communities with limited technology access, lower digital literacy, people with disabilities, and assistance in different languages. The customer support center also provides equitable support by providing assistance to our customers based on their individual needs.

Describe how your agency engaged with communities and populations, particularly those who have been historically excluded and marginalized by governmental decisions?

The Exchange works closely with a number of advisory groups, Community Based Organizations (CBO), and over 1,000 Navigators to understand the needs of the various communities we serve, and more specifically the communities that have historically not been considered. CBOs and navigators will often provide feedback on the system interface and the impact it has on customers being able to successful enroll. Additionally, the Exchange conducts interviews with users after each Open Enrollment period to understand better the customer experience. These engagements with the communities served in guiding the necessary updates to the Healthplanfinder system.

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What input did your agency receive and how was it incorporated into your proposal?

With the current funding we have been able to maintain and update our systems to meet the needs of various communities. This is a request for funding to continue to be able to meet the needs of our customers and maintain accessibility and access.

Explain why and how these equity impacts will be addressed, i.e., consider communities or populations excluded or disproportionately impacted by the proposal

People in historically marginalized communities, with accessibility needs and people with low digital literacy would be most impacted and it would further the divide in access for those who rely on our customer support staff to aid them in obtaining benefits.

Assumptions and Calculations

Expansion or alteration of a current program or service

The base budget does not include funding to administer the federally required solicitation of our major contracts or the one-time call center or system integrator startup costs or overlapping transition costs with the existing vendors.

Detailed assumptions and calculations

The Exchange requests \$2,640,000 in the 2025-27 biennium and \$250,000 in fiscal year 2028 to support one-time call center and Healthplanfinder system integrator procurement costs.

- No increase in Carrier Assessment is expected to cover this expenditure.
- All costs associated with this decision package are eligible for 90% FFP

Objects		FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031
A	Salaries & Wages	206,000	206,000	-	-	-	-
B	Employee Benefits	71,000	71,000	-	-	-	-
C	Personal Serv Contr	1,080,000	907,000	250,000	-	-	-
E	Goods and Services	53,000	44,000	-	-	-	-
G	Travel	1,000	1,000	-	-	-	-
Total		1,411,000	1,229,000	250,000	-	-	-

Customer Support Center Re-Procurement:

Objects of Expenditure:	FY2026	FY2027	FY2028	FY2029
A - Salaries And Wages	\$ 157,000	\$ 137,000	\$ -	\$ -
B - Employee Benefits	\$ 53,000	\$ 46,000	\$ -	\$ -
C - Personal Service Contracts	\$ 519,000	\$ 250,000	\$ -	\$ -
E - Goods And Services	\$ 39,000	\$ 29,000	\$ -	\$ -
G - Travel	\$ 1,000	\$ 1,000	\$ -	\$ -
Total	\$ 769,000	\$ 463,000	\$ -	\$ -

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- Project Management Services: \$350,000
- CSC Technical advisor: \$175,000
- Quality Assurance: \$150,000
- Legal Review: \$95,000

Healthplanfinder System Integrator Re-procurement:

Objects of Expenditure:	FY2026	FY2027	FY2028	FY2029
A - Salaries And Wages	\$ 49,000	\$ 69,000	\$ -	\$ -
B - Employee Benefits	\$ 18,000	\$ 25,000	\$ -	\$ -
C - Personal Service Contracts	\$ 562,000	\$ 657,000	\$ 250,000	\$ -
E - Goods And Services	\$ 14,000	\$ 15,000	\$ -	\$ -
G - Travel	\$ -	\$ -	\$ -	\$ -
Total	\$ 643,000	\$ 766,000	\$ 250,000	\$ -

- Project Management Services: \$524,000
- SI Technical advisor: \$312,000
 - Market Analysis and Outreach:
 - Requirements Documentation:
 - RFP Development and Evaluation:
- Business Lead: \$312,000
- Quality Assurance: \$225,000
- Legal Review: \$95,000

Activities not included in this budget request:

Costs associated with transitioning to a new customer support center or system integrator would include infrastructure ramp-up costs, costs associated with onboarding call center staff, and the cost of a project manager experienced in call center and system integrator transitions.

If a new system integrator or customer support center vendor is selected, the Exchange would also require expenditure authority for one-time transition costs in FY2027 and FY2028. It is the Exchange's intent to request those funds in future budget requests once more information is available.

Budget Request	Send to OFM	Activity
2025-27 Bien	Sep 2024	Decision Package 1: Joint Procurement
2026 Supp	Sep 2025	Decision Package 2: CSC Transition (if needed)
2027-29 Bien	Sep 2026	Decision Package 3: SI Transition (if needed)
2027-29 Bien	Sep 2026	Decision Package 4: Post Procuring CSC M&O Adjust
2028 Supp	Sep 2027	Decision Package 5: Post Procurement SI M&O Adjust

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Historical Funding

The Exchange is not funded to support these major procurements that only occur every 5-10 years. The customer support center was last procured in 2018-2019 and Healthplanfinder's system integrator contract was procured in 2018-2019.

FY2024

- FTE = 0
- Total Funds = \$0
- Near General Fund = \$0
- Other Funds = \$0

FY2025

- FTE = 0
- Total Funds = \$0
- Near General Fund = \$0
- Other Funds = \$x0

Workforce assumptions

2 FTEs:

- Customer Support Center Program Manager
 - The CSC is the front door to health and dental coverage for 1.8 million Washingtonians. Providing clear requirements, continuity through procurement to implementation and ongoing vendor performance management means stronger procurement and fair selection process and drives satisfaction for customer experience services over the life of the vendor contract for call center services and other related contracts.
 - Lead the Exchange's team for RFP evaluations, scoring, and ASV selection process
 - Lead communications during the transition activities
 - Coordinate contract transition activities with the ASV project management team
 - Provide support to the team during intense periods of ongoing operations and overlapping critical focus on implementation activities
 - Responsible for creating a Call Center Services roadmap to transform customer experiences and creates a framework and timeline for services to be handled in-house and others outsourced per the published RFP
- Senior Contracts Specialist
 - This resource will facilitate the procurement process from start to finish, be the sole point of contact for vendors and outside parties, and help coordinate requirements

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gathering and evaluation criteria meetings with all stakeholders and subject matter experts.

Strategic and Performance Outcomes

Strategic framework

As the single point of entry for Washington Apple Health, Qualified Health Plans (QHP) and Qualified Dental Plans (QDP), the Exchange serves more than 1.8 million residents annually. This required activity aligns with the Exchange's strategic direction as this procurement will enable the Exchange to identify a SI partner to provide the maintenance and operations of *Washington Healthplanfinder*. A successful transition will enable the Exchange to focus on an improved customer experience, website modernization as well as growth.

This proposal directly relates to Results Washington's Healthy and Safe Communities goal. Healthplanfinder has an impact on each of the outcome measures within that goal—starting with ensuring access to quality healthcare. Healthplanfinder is a critical tool for Washingtonians to apply for and enroll in healthcare plans, explore eligibility for subsidies or tax premiums that make healthcare coverage more affordable, and enroll in plans that will help them plans that allow them access care. Access to healthcare is more critical now than ever. Better access to healthcare leads to a healthier population which furthers additional Results Washington goals.

Performance outcomes

The purpose of the Call Center solicitation is to select a vendor to operate a full-service customer support center. In general, the successful CSC vendor will perform the following functions:

- Receive inquiries and answer questions about health insurance eligibility, application and enrollment, and the availability of tax-credits and cost sharing reductions.
- Serve customers with a simple, streamlined approach to ensure ease of use and customer satisfaction.
- Provide a toll-free phone number to respond to inquiries regarding coverage offered through the Exchange.
- Facilitate the application and enrollment process to include assistance with web-based and paper-based applications processing.
- Help consumers navigate through the Medicaid Expansion program (based on Modified Adjusted Gross Income parameters, or MAGI), determine eligibility for Advanced Premium Tax Credit (APTC), and facilitate enrollment in QHPs and QDPs.
- Triage calls concerning eligibility for other health benefit programs available to Washington State consumers, and for more complex questions, route accordingly.
- Upload scanned documents to customer dashboards and data entry of paper applications.

A successful System Integrator solicitation will be measured using different metrics:

- No visible impact of vendor transition to external stakeholders and to customers
- Increased rate of defect reduction/closure
- Increased mix of enhancement activities compared to M&O activities

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Other supporting materials

Copies of the APD have been previously provided to HCA, OFM, the House and Senate.

Other Collateral Connections

Intergovernmental

Not applicable with this request.

Legal or administrative mandates

Not applicable with this request.

Changes from current law

Not applicable with this request.

State workforce impacts

Not applicable with this request.

State facilities impacts

Not applicable with this request.

Puget Sound recovery

Not applicable with this request.

Other supporting materials

Copies of the APD have been provided to HCA, OFM, the House and Senate.

Information technology (IT)

ABS will pose the question below for *each* DP. If the answer is yes, you will be prompted to attach an IT addendum. (See Chapter 10 of the budget instructions for additional requirements.)

Information Technology

Does this DP include funding for any IT-related costs, including hardware, software (including cloud-based services), contracts or IT staff?

No

Yes

Please download the [IT-addendum](#) and follow the directions on the bottom of the addendum to meet requirements for OCIO review. After completing the IT addendum, please upload the document to continue.

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