



**Request for Qualifications and Quotations  
Open Enrollment Consumer Survey Services  
for  
Washington Health Benefit Exchange**

**HBE 15-002**

**Released by  
Washington Health Benefit Exchange  
810 Jefferson Street SE  
P.O. Box 657  
Olympia, Washington 98507**

**RFQQ RELEASE DATE: May 8, 2015**

**RESPONSES DUE: May 26, 2015, 3:00 p.m. PST (electronically *received*)**

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## **1. INTRODUCTION**

### **1.1. TITLE – OPEN ENROLLMENT CONSUMER SURVEY SERVICES**

The Washington Health Benefit Exchange (HBE) is initiating this Request for Qualifications and Quotations (RFQQ) to secure consumer survey services for HBE.

HBE will award one contract to the respondent most capable of providing the required levels of experience and expertise for an amount not to exceed \$275,000. The successful Vendor will perform the HBE responsibilities and duties, as defined in Statements of Work, throughout the term of the resulting Contract.

### **1.2. HBE BACKGROUND**

HBE is a health insurance marketplace where consumers may enroll in individual or small-employer group coverage. HBE is also the marketplace where newly eligible adults may enroll in Washington Apple Health Medicaid coverage and where individuals and families renew their coverage in Washington Apple Health. The Healthplanfinder system provides all consumers with online access to HBE's marketplace. The marketplace also provides in-person assistance made available statewide by HBE's Customer Service Center (call center), agents and brokers, certified assistors, and community partners. For further information on HBE, please use the following link: <http://wahbexchange.org/about-us/what-exchange/>.

Information on HBE enrollment may be accessed at this link: <http://wahbexchange.org/news-resources/press-room/press-releases/2015-enrollment-report/>.

### **1.3. PURPOSE**

HBE is soliciting a Vendor to perform a survey of the consumer experience in Healthplanfinder from the beginning of HBE's second open enrollment period on November 15, 2014 through the time consumers respond to the survey. The open enrollment period ended February 15, 2015 and HBE followed with a special enrollment period of February 17, 2015 through April 17, 2015. Total qualified health plan enrollment through Healthplanfinder is currently 170,000 enrollees, and enrollment through Healthplanfinder of Washington Apple Health newly eligible adults is currently 530,000 individuals.

The primary purpose of the consumer survey is to collect information that will assist HBE in evaluating and improving its performance from the perspective of consumers. The results will be compared to key results from the first consumer survey performed in 2014. Reports, presentations and overall results from the consumer survey will be used to inform the HBE Board, Washington State health care leaders, and staff.

### **1.4. SCOPE OF WORK**

A qualified Vendor will perform, at a minimum, these consumer survey tasks for HBE.

#### **1.4.1. Work Plan**

The Vendor will provide a work plan that specifies the work necessary to complete the consumer survey services herein. The work plan will identify the tasks, time frames and key personnel for each task and highlight key milestones. The work plan must contain the deliverables in Section 5.1, Cost of Consumer Survey Services, or the Vendor must specify why it is preferable to use different deliverables. The Vendor's work plan will

provide a final report to HBE by September 8, 2015. The work plan submitted by the Vendor may be included in the contract pursuant to this RFQQ at the discretion of HBE.

#### **1.4.2. Individual Survey**

The Individual Survey will be performed for non-enrollees and enrollees of individual qualified health plans and newly eligible adults and participants in eligibility redeterminations for Washington Apple Health.

##### **1.4.2.1. Revised Individual Survey Questions**

The Vendor will be responsible for developing and submitting to HBE the final survey questions used for the Individual Survey. The final survey questions will be developed by revising the HBE 2014 individual consumer survey questionnaire which is provided as an addendum to this RFQQ and posted on the Washington Electronic Business Solution (WEBS) website at <https://fortress.wa.gov/ga/webs/>. The Vendor will assist HBE in revising the 2014 survey by, at a minimum:

- Reviewing additional questions and modifications to questions made by HBE
- Reviewing the retention of key questions that will provide a comparison of key results to the 2014 survey
- Developing additional questions or modifying questions with guidance from HBE
- Where necessary, modifying the flow of the survey questions to enhance accurate data collection

The task of revising the survey questions will also include the Vendor's programming and testing of the survey.

##### **1.4.2.2. Analytic Plan for the Individual Survey**

The Vendor will develop an analytic plan for the Individual Survey that, at a minimum, contains the following:

A sampling plan: HBE will need to, at a minimum, sample by the following groups:

- Applicants found eligible for individual qualified health plans but did not complete enrollment
- Enrollees in individual qualified health plans broken down by:
  - Individuals newly enrolled through Healthplanfinder
  - Individuals who retained enrollment through Healthplanfinder
    - In the same qualified health plan
    - Switched to another qualified health plan
  - Enrollees by metal level plan selection (with a focus on Bronze plan enrollees)
- Dis-enrollees from individual qualified health plans broken down by federal poverty level (FPL) income bands:

- 0-138%
- Greater than 138%-200%
- Greater than 200%-300%
- Greater than 300%-400%
- Greater than 400%
- Washington Apple Health enrollees
  - Newly eligible adults
  - Eligibility redeterminations

The Vendor will provide a methodology for collecting the data specified in the sampling plan. Online and phone data collection methods will be needed to attain the sample sizes necessary to produce valid results. The Vendor will also include any statistical methods or techniques used to capture demographic variables throughout the sample population. Processes for cleaning the data and any design for weighting the sample data will also be included in the Vendor's analytic plan.

#### **1.4.2.3. Performing the Individual Survey**

The Vendor will need to perform the Individual Survey and manage all aspects of collecting accurate, valid data in support of reliable results. The Vendor will need to advise HBE in determining applicable methods of calculating and achieving a sufficient response rate for the survey, which may necessitate achieving a sufficient response rate by different subpopulations of consumers.

The Vendor will prepare all consumer communication necessary to perform the Individual Survey. Communications prepared by the Vendor to perform the survey must be approved by HBE, and the Vendor will work closely with HBE on all aspects of communicating with consumers about the survey. Communication prepared by the Vendor will involve, at a minimum, notifying consumers about the survey and providing communication to potential respondents.

#### **1.4.2.4. Reports and Data**

The Vendor will develop three reporting products for the Individual Survey. Each product developed by the Vendor will be suitable for submission to the HBE Board, display on the HBE website for access, and interaction with multiple public audiences.

*Toplines Presentation:* The initial presentation will provide overall results soon after the survey data collection has been completed. The Toplines Presentation will provide initial highlights of the overall customer experience. It will include graphic displays to present key overall themes and insights from the consumers' perspective on service received through Healthplanfinder, and when useful, present key themes from the perspective of key subpopulations such as qualified health plan enrollees or highlight comparisons to the 2014 survey results.

*Final Presentation:* Building from the Toplines Presentation, the Final Presentation will provide an analysis of key results and themes of the survey population, subpopulations, demographic groups, and through comparisons to the 2014 survey

results. The presentation will also focus upon, but not be limited to, evaluating the performance of customer service by identifying further areas of improvement to help retain enrollees and attract additional consumers, assessing the value proposition for consumers, and providing a better understanding of whether expectations were met.

*Final Report:* This report will provide HBE with comprehensive survey findings on the Individual Survey. The Vendor will provide a detailed outline for approval by HBE before beginning work on the Final Report. The report will provide an in-depth analysis by the overall population and relevant subpopulations. The report will use “plain talk” and be suitable for communication across a wide range of audiences. The Vendor’s report will organize, present, and discuss the data by topics and themes that best communicate results from the consumers’ perspective in, for example, the following ways:

- Improve the information about the consumer experience through Healthplanfinder
  - Identify the most important elements of customer service as expressed by Healthplanfinder consumers
  - Develop a better understanding of the ways those elements influence retaining enrollees or increasing total enrollment
- Provide themes and summary results that highlight strengths and weaknesses in the customer service experience
- Identify barriers to meeting and exceeding the customer’s expectations such as IT system performance or resolving issues in a timely fashion
- Assess the perceived value proposition of enrolling through Healthplanfinder
- Provide insights into what drives consumer enrollment choices
- Comparisons to key results from the 2014 survey

The Vendor will supply HBE with the raw survey data from the consumer responses. The Vendor will use a standard electronic format specified by HBE when submitting the survey data to HBE.

#### **1.4.3. Healthplanfinder Business Survey**

The Vendor will perform a survey of employers enrolled in small group plans through Healthplanfinder Business, the program that operates HBE’s Small Business Health Options Program (SHOP). Currently, Healthplanfinder Business covers approximately 500 enrollees through 90 employer groups. The Vendor will, but will not be limited to, performing the following tasks:

- Develop a brief, roughly 15-30 question, survey that assesses the customer service experience from the perspective of employers. The survey will, at a minimum, collect data on the ease of use of the IT system, customer service received by employers, and the value proposition of enrolling in a small group plan through Healthplanfinder Business.
- Develop an analytic plan and collect survey data. The Vendor will advise HBE on the best methods, e.g., online, phone, or paper, of performing the survey to capture informative, valid results from a small population. The Vendor will need to

collect data from an appropriate mix of employers that offered a single plan to a group and those that offered a choice of plans by metal level. The Vendor will prepare all consumer communication necessary to perform the Healthplanfinder Business Survey and communications prepared by the Vendor to perform the survey must be approved by HBE.

- Develop a final presentation that analyzes key results and themes of the customer service experience of employers who purchased a SHOP plan through Healthplanfinder Business. The presentation will, at a minimum, highlight elements important to the customer experience of employers, identify barriers to meeting or exceeding the customer service expectations of an employer, and highlight the type of customer service experiences that should be replicated.

### 1.5. PERIOD OF PERFORMANCE

The initial period of performance of the Contract resulting from this RFQQ is tentatively scheduled to begin on or before June 19, 2015 and end on December 31, 2015. At HBE's sole discretion, the contract may be amended and extended for up to three (3) additional years, in whatever time increments HBE deems appropriate.

### 1.6. ACQUISITION AUTHORITY

The Washington Health Benefit Exchange issues this Request for Proposal acting under the authority pursuant to CH. 43.71 RCW. CH. 43.71 RCW is the statute that establishes HBE and the HBE Board.

### 1.7 RFQQ SCHEDULE

This RFQQ is being issued under the following Schedule. Required Response deadlines are mandatory and non-negotiable. Failure to meet any of the required deadlines (dates and times) will result in disqualification from participation. The schedule outlines the process for important action dates and times. HBE reserves the right to revise this schedule at any time.

Item	Action	Date
1	Exchange issues RFQQ.	5/8/2015
2	Vendors may submit written questions until 3:00 p.m. PST.	5/19/2015
3	Exchange will issue final responses to Vendor questions in an addendum by close of business.	5/22/2015
4	Vendors may submit an optional letter of intent to respond to this RFQQ.	5/22/2015
5	<b>Vendors must submit responses to RFQQ Coordinator by 3:00 p.m. PST.</b>	<b>5/26/2015</b>
6	Exchange evaluation of responses.	5/27/ to 6/2/2015
7	Target date for oral presentations should the Exchange opt to hold oral presentations.	6/3/ to 6/5/2015
8	Exchange notifies Apparently Successful Vendor (ASV) and begins contract negotiations. Non-ASV's may request a debriefing.	6/9/2015

9	Target date for contract execution.	6/19/2015
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## 2. ADMINISTRATION/GENERAL INFORMATION

### 2.1. COMMUNICATION THROUGH RFQQ COORDINATOR

Upon release of this RFQQ, all Vendor communications concerning this solicitation must be directed to the RFQQ Coordinator listed below. If the Vendor communicates with any other employees of the Washington Health Benefit Exchange concerning this RFQQ, unless such communication is otherwise required or allowed by law or written HBE policy, HBE may disqualify the Vendor from responding to this RFQQ.

John Flanagan  
Washington Health Benefit Exchange  
HBE Contracts Office  
RE: HBE15-002  
Email: [contracts@WAHBExchange.org](mailto:contracts@WAHBExchange.org)

Responses should be based on the material contained in the RFQQ, any related amendments/addenda, and any questions and written answers directed through the RFQQ Coordinator. All oral communications will be considered unofficial and non-binding on the HBE. Vendors should rely only on written statements issued by the RFQQ Coordinator or his designee.

### 2.2. OPTIONAL LETTER OF INTENT

Vendors are encouraged to submit by email an optional Letter of Intent to respond to HBE-15-002. Failure to submit a Letter of Intent will not disqualify the Vendor's organization from further participation in the RFQQ; however, it will assure that the Vendor's firm will promptly receive all addenda and announcements concerning the acquisition. The Letter of Intent should:

- 1) State that the Vendor wishes to respond to HBE-15-002
- 2) Include the Vendor's mailing address, telephone number, and e-mail address.

Email the Letter of Intent to:

John Flanagan  
RFQQ Coordinator  
Health Benefit Exchange  
RE: HBE15-002  
Email: [contracts@wahbexchange.org](mailto:contracts@wahbexchange.org)

The Letter of Intent should be received by the date stated in Section 1.7, RFQQ Schedule.

### 2.3. VENDORS' QUESTIONS AND HBE ANSWERS

Vendor questions regarding this RFQQ will be accepted until the dates and times specified in RFQQ Section 1.7, *RFQQ 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.

John Flanagan

Washington Health Benefit Exchange  
HBE Contracts Office  
RE: HBE15-002  
Email: [contracts@WAHBExchange.org](mailto:contracts@WAHBExchange.org)

HBE’s official written answers to the Vendor’s questions will be posted to Washington Electronic Business Solution (WEBS) website at <https://fortress.wa.gov/ga/webs/>. Please check WEBS regularly for updates, amendments and other RFQQ addenda.

The Vendor that submitted the questions will not be identified. Verbal responses to questions will be non-binding on the HBE. Only written responses posted to WEBS and the HBE’s Procurement Web Site 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

**2.4. E-MAIL**

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

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

**2.5. PROPRIETARY INFORMATION/PUBLIC DISCLOSURE**

The HBE is subject to Washington State’s Public Records Act (Chapter 42.56 RCW). Vendor’s Response can be disclosed through the process set forth in this section. Portions of a Vendor’s Response may be protected from disclosure through the process set forth in this section.

A Vendor cannot restrict its entire Response or entire sections of the Response from disclosure. A Vendor also cannot restrict its pricing from disclosure. Attempts to restrict disclosure using footer on every page to restrict disclosure will not be honored and may require the Vendor to resubmit the Response or subject the Vendor to disqualification.

If the Vendor wants to protect any Proprietary Information that is included in its Response from disclosure, the information shall be clearly designated by the Vendor as Proprietary Information. “Proprietary Information” is defined as information owned by Vendor to which Vendor claims a protectable interest under law. Proprietary Information may include, but is not limited to, information protected by copyright, patent, trademark, or trade secret laws.

To the extent consistent with Chapter 42.56 RCW, the Public Records Act, the HBE shall maintain the confidentiality of Vendor’s information marked Proprietary Information. If a

public disclosure request is made to view Vendor's Proprietary Information, the HBE shall notify Vendor of the request and of the date that the Proprietary Information shall be released to the requester unless Vendor obtains a court order enjoining that disclosure. If Vendor fails to obtain a court order enjoining disclosure, the HBE will release the Proprietary Information on the specified date.

The HBE's sole responsibility shall be limited to maintaining the Vendor's identified Proprietary Information in a secure area and to notify Vendor of any request(s) for disclosure for so long as the HBE retains Vendor's information in the HBE records. Failure to label materials as Proprietary Information or failure to timely respond after notice of a public disclosure request has been given shall be deemed a waiver by Vendor of any claim that such materials are exempt from disclosure.

All requests for information should be directed to the RFQQ Coordinator.

## **2.6. COSTS OF RESPONSE PREPARATION**

HBE will not pay any Vendor costs associated with preparing or presenting any Response in response to this RFQQ.

## **2.7. RESPONSE PROPERTY OF THE HBE**

All materials submitted in response to this solicitation become the property of the HBE, unless received after the deadline in which case the Response is returned to the sender. The HBE has the right to use any of the ideas presented in any material offered. Selection or rejection of a Response does not affect this right.

## **2.8. WAIVER OF MINOR IRREGULARITIES**

Read all instructions carefully. If the Vendor does not comply with any part of this RFQQ, HBE may, at its sole option, reject the Vendor's Response as non-responsive. HBE reserves the right to waive minor irregularities contained in any Response.

## **2.9. ERRORS IN RESPONSE**

Vendors are liable for all errors or omissions contained in their Responses. Vendors will not be allowed to alter Response documents after the deadline for Response submission. The HBE is not liable for any errors in Responses. The HBE reserves the right to contact Vendor for clarification of Response contents. HBE reserves the right to correct minor obvious error contained in any Response.

In those cases where it is unclear to what extent a requirement or price has been addressed, the evaluation team(s) may, at their discretion and acting through the RFQQ Coordinator, contact a Vendor to clarify specific points in the submitted Response. However, under no circumstances will the responding Vendor be allowed to make changes to the proposed items after the deadline stated for receipt of Responses

## **2.10. RFQQ AMENDMENTS**

HBE reserves the right to amend this RFQQ. Amendments and all communications regarding this RFQQ will be posted to the Washington Electronic Business Solution (WEBS) website at <https://fortress.wa.gov/ga/webs/>

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 HBE's official answers are an amendment to the RFQQ.

## **2.11. WITHDRAWAL OF RESPONSE**

Vendors may withdraw a Response that has been submitted at any time up to the Response due date and time (identified in Section 1.7, RFQQ Schedule). To accomplish Response withdrawal, a written request signed by an authorized representative of Vendor must be submitted to the RFQQ Coordinator. After withdrawing a previously submitted Response, Vendor may submit another Response at any time up to the Response submission due date and time.

## **2.12. RIGHT TO CANCEL**

With respect to all or part of this RFQQ, the HBE reserves the right to cancel or reissue at any time without obligation or liability.

## **2.13. RIGHT TO REJECT ALL RESPONSES**

HBE may, at any time and at its sole discretion and without penalty, reject any and all Responses and issue no contract as a result of this RFQQ.

## **2.14. AUTHORITY TO BIND HBE**

The HBE Chief Executive Officer and the HBE Chief Executive Officer's designees are the only persons who may legally commit HBE to any contracts. The Vendor shall not incur, and HBE shall not pay, any costs incurred before a Contract is fully executed.

## **2.15. CONTRACT**

HBE will award one Contract to the Vendor most capable of providing professional Consumer Survey personnel with the experience and expertise required. The ASV will be expected to sign a Contract which is substantially the same as the Contract included in this RFQQ as Exhibit C. The Contract will also incorporate this RFQQ and the Vendor's Response.

Either party may propose additional Contract terms and conditions during negotiation of the final Contract. However, as stated in 3.1.1.9 of this RFQQ, proposed language alternate to the attached Sample Contract must be included in the Vendor's Letter of Transmittal. The Vendor may not substitute their own contract for the HBE Contract.

Tentatively, the period of performance of the Contract(s) resulting from this RFQQ is June 19, 2015, (or date of execution, whichever is later), through December 31, 2015. At HBE's sole discretion, this Contract may be extended via amendment for up to three (3) additional years, in whatever time increments HBE deems appropriate.

If the ASVs refuses to sign the final Contract within ten (10) calendar days of delivery, HBE may revoke the award and award the Contract to the next-highest-ranked Vendor(s), or not make an alternate award.

### 3. INSTRUCTIONS; VENDOR RESPONSE

Vendors must follow these instructions exactly or their Response may be deemed non-responsive.

#### 3.1. RESPONSE CONTENTS

Responses should contain, in the order given:

##### 3.1.1. Letter of Transmittal (MANDATORY)

A Letter of Transmittal should be prepared on Vendor letterhead and signed by an individual who is authorized to commit the Vendor to the services and requirements as stated in this RFQQ. The Letter of Transmittal must be submitted as a separate document and include, in the order given:

##### 3.1.1.1. Identifying information about the Vendor to include the following:

- a. The Vendor's business name, address, telephone number, email address (if any) and fax number.
- b. The legal status of the bidding entity (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized as it now substantially exists.
- c. The name, address, email address and telephone number of any sole proprietor, and of the partners or principal officers as appropriate.
- d. The name of the person who will have primary contact with the Health Benefit Exchange in carrying out the responsibilities of this Contract.
- e. The name(s) and titles of all persons authorized to speak on behalf of the Vendor on matters related to this procurement.
- f. The name and address of the entity that receives legal notices for the Vendor.

**3.1.1.2.** If Response is being submitted in partnership with one or more entities, identify the entities and their primary responsibilities if selected as the ASV. Provide brief description of the relationship with the Vendor and the process for determining which entity will perform the work.

**3.1.1.3.** Provide a statement affirming that by submitting a response to this solicitation, the Vendor and its key subcontractors represent that they are not in arrears in the payment of any obligations due and owing the State of Washington, including the payment of taxes and employee benefits, and that it shall not become in arrears during the term of the Contract if selected for Contract award.

**3.1.1.4.** The Vendor's Washington Uniform Business Identification (UBI) number. The Vendor must be licensed to do business in the state of Washington before any resulting Contract is executed. Provide the Vendor organization's UBI number issued by the Washington State Department of Licensing or an affirmation that the organization will obtain a business license before executing a Contract.

**3.1.1.5.** State Vendor's Federal Employer Tax Identification Number. If Vendor is a sole proprietor, they may use the following format when submitting the Federal ID number: xxx-xx-1234. For the "1234", please use the last 4-digits of Vendor's social security number. If the Vendor is selected as a successful Vendor, HBE will send a W-9 to obtain the complete Federal

ID/SSN number.

**3.1.1.6. Conflict of Interest information:**

- a. If any of the Vendor's employees or officers or subcontractors employees or officers were employed by the Washington Health Benefit Exchange or the state of Washington during the last two years, state their positions within the organization, state their proposed duties under any resulting Contract, their duties and position during their employment with HBE or the state, and the date of their termination from HBE/state employment.
- b. If any owner, key officer or key employee of the Vendor is related by blood or marriage to any employee of HBE or has a close personal relationship to same, identify all the parties, identify their current or proposed positions and describe the nature of the relationship.
- c. Vendor must disclose if they have a business relationship with Deloitte Consulting, or other major HBE Contractor
- d. If the Vendor is aware of any other real or potential conflict of interest, the Vendor must fully disclose the nature and circumstances of such potential conflict of interest. If, after review of the information provided and the situation, HBE determines that a potential conflict of interest exists, HBE may, at its sole option, disqualify the Vendor from participating in this procurement. Failure to fully disclose any real or potential conflict of interest may result in the disqualification of the Vendor or the Termination for Default of any contract with the Vendor resulting from this procurement with the Vendor.

**3.1.1.7. Vendors must indicate whether they have had a contract terminated for default in the last five years. Termination for default is defined as a notice to stop work due to the Vendor's nonperformance or poor performance, where the issue of performance was either not litigated due to inaction on the part of the Vendor, or litigated and determined that the Vendor was in default.**

If the Vendor has had a contract terminated for default in the last five years, the Vendor must submit full details including the other party's name, address and telephone number. The Vendor must specifically grant HBE permission to contact any and all involved parties and access any and all information HBE determines is necessary to satisfy its investigation of the termination. HBE will evaluate the circumstances of the termination and may at its sole discretion, bar the participation of the Vendor in this procurement.

**3.1.1.8. The page numbers and names of any Response elements being claimed as "Proprietary" or "Confidential" (see Section 2.5). Include an explanation for each claim of confidentiality.**

**3.1.1.9. Any alternate contract language the Vendor wishes to propose (see section 2.15). If alternate contract language is longer than one page, attach it to your Letter of Submittal as a separate document.**

**3.1.1.10. A list of all RFQQ amendments received by amendment issue date. If no RFQQ amendments were received, write a statement to that effect. Vendor questions/ HBE responses are considered an amendment to the RFQQ.**

**3.1.1.11.** A detailed list of all materials and enclosures being sent in the Response.

**3.1.2. Certifications and Assurances (MANDATORY)**

Certifications and Assurances (Exhibit A) signed by a person authorized to bind the Vendor to a contract.

**3.1.3. Vendor's Response to RFQQ HBE 15-002 (MANDATORY)**

**3.2. RESPONSE FORMAT (MANDATORY)**

- a. The Letter of Transmittal and responses are to be submitted via email in unrestricted Word, Excel or "Pdf" format.
- b. State responding organization's name on the first page of all RFQQ responses.
- c. Pages are to be formatted as standard 8.5" x 11" white paper. Font size can be no less than 11 point. Margins can be no less than 1 inch. Each page must be numbered.
- d. Figures and tables must be numbered and referenced in the text of the Response by that number. Foldouts containing charts, spreadsheets, and oversize exhibits are permissible.
- e. The Response, as well as any reference materials presented by Vendor, must be written in English and Vendor must provide all rates in United States dollars.
- f. Write the RFQQ response in the order given in Exhibit B. Title and number each item in the same way it appears in the instructions. The Vendor must respond to every element, except where otherwise stated.
- g. Some elements may have page limitations that will be enforced.

**3.3. DELIVERY OF RESPONSES (MANDATORY)**

Email Response(s) to:

RFQQ Coordinator  
John Flanagan  
Washington Health Benefit Exchange  
HBE Contracts Office  
RE: HBE15-002  
Email: [contracts@WAHBExchange.org](mailto:contracts@WAHBExchange.org)

The Response must arrive at the HBE, to the RFQQ Coordinator, no later than 3:00pm, PST, on the Response Due Date stated in the RFQQ SCHEDULE.

Late Responses will not be accepted and will automatically be disqualified from further consideration.

HBE does not take responsibility for any problems in the email delivery services. The responding Vendor is responsible for ensuring delivery in accordance with the specifications in this RFQQ. Transmission of the Response to any other email address is not equivalent to receipt by HBE.

## **4. RFQQ QUALIFICATIONS**

### **4.1. MANDATORY QUALIFICATIONS**

#### **4.1.1 Experience of Accountable Person**

The accountable person for the Contract awarded through this RFQQ must have a minimum of ten (10) years of experience performing consumer survey services.

#### **4.1.2 Collection of Survey Responses**

The Vendor must attest to the ability to collect survey responses through both online and phone media. Vendor must attest that personnel or subcontractors may contact consumers only after passing a background check performed by HBE.

#### **4.1.3 Performing Surveys in English and Spanish**

The Vendor must attest to the ability to develop surveys and collect survey responses in both English and Spanish.

#### **4.1.4 Work Plan**

The Vendor must submit a work plan that completes the consumer survey services as specified herein and within the time frames specified herein.

### **4.2. EXPERIENCE OF VENDOR'S PROPOSED TEAM (Scored)**

Provide resumes (three pages or less on each person) for the accountable person and key personnel who comprise the consumer survey team and would perform the services described herein.

Name, Title

Education, Degrees, Certificates

Description of specific or unique consulting skills

The Resume should provide a non-technical summary of the consumer survey team's overall background and skills as it relates to providing services specified herein. This narrative should demonstrate proven ability to perform consumer survey services for HBE as specified in this RFQQ.

Experience: Describe the accountable person's past experience with emphasis on consulting which may relate to the services described herein.

Include a list of contracts the accountable person has performed during the last five years that relate to the ability to provide services similar to those required under this RFQQ. Briefly describe no more than two of these projects, preferably a consumer survey about health care performed within the last three years and preferably a survey about consumer services performed by a state-based health benefit exchange.

### **4.3. QUALIFICATIONS OF VENDOR'S FINAL DELIVERABLE (Scored)**

The Vendor will provide one example of a final deliverable or product that best represents the Vendor's ability to produce a Final Presentation or Final Report as described in Reports and Data of Section 1.4.

### **4.4. REFERENCES (Checked and evaluated at the option of HBE)**

Two references for the person who would be accountable for the Contract with contact information and a brief description of the type of service provided. By submission of the

references the Vendor grants permission to HBE to contact the references and others who may have pertinent information.

**5. COST RESPONSE**

**5.1. COST OF CONSUMER SURVEY SERVICES**

Use the format below to bid the project based upon Section 1.4, Scope of Work. Total cost of the bid may not exceed \$275,000. Proposals resulting in a total cost in excess of \$275,000 will be disqualified.

	<u>Deliverables</u>	<u>Cost</u>
1.	Revised Consumer Survey	\$
2.	Analytic Plan	\$
3.	Performing the Survey	\$
4.	Reports and Data	\$
5.	Healthplanfinder Business Survey	\$
		Total Cost: \$

**Hourly Rates**

The Vendor will provide the title and hourly rates for each position that may perform work throughout the term of a resulting Contract. Include additional lines as necessary to the table below.

<u>Title</u>	<u>Hourly Rates</u>
Title 1	\$
Title n	\$

**6. EVALUATION AND SELECTION CRITERIA**

**6.1. EVALUATION PROCEDURES—ADMINISTRATIVE**

Responsive Vendor responses will be evaluated strictly in accordance with the requirements stated in this RFQQ and any addenda issued.

The evaluation of Vendor Responses shall be accomplished by an evaluation team designated by the Exchange, which will determine the ranking of the responses.

The RFQQ Coordinator will evaluate the Cost Response.

6.1.1. Clarification of Response

The RFQQ Coordinator may contact the Vendor for clarification of any portion of the Vendor’s response.

6.1.2. Administrative Screening

Responses will be reviewed initially by the RFQQ Coordinator to determine on a pass/fail basis. The evaluation team will only evaluate Responses meeting all administrative requirements.

6.1.3. Qualitative Review and Scoring

Responses that pass the administrative screening review will be evaluated and scored based on responses to the requirements in the RFQQ.

**6.2. EVALUATION SCORING AND WEIGHTING**

HBE will evaluate Vendor responses to Section 4, RFQQ Qualifications, and Section 5, Cost Response.

Section 4.2 and 4.3: HBE will assign scores based upon a Vendor’s responses in Section 4.2, Experience of Vendor’s Proposed Team, and Section 4.3, Qualifications of Vendor’s Final Deliverable. Evaluators will assign points based on the Vendor’s response to each Section based on the following:

- The Vendor receiving the highest number of points in Section 4.2, Experience of Vendor’s Proposed Team, will receive a baseline score of 10.
- The Vendor receiving the highest number of points in Section 4.3, Qualifications of Vendor’s Final Deliverable, will receive a baseline score of 10.

Other Vendors in each of the two sections will receive a score based on the following formula:

***Vendor Score = (Vendor Points ÷ Highest Vendor Points) X Section Baseline***

Each Vendor’s score will then receive the weight shown below in the table under Total Score.

A score of zero by all evaluators on any Scored Section will result in a Vendor’s proposal being disqualified. Total points will be aggregated across all sections.

HBE may select the ASV based on the scoring performed in Section 4.2, Section 4.3, and Section 5, or at its sole discretion, may select the top scoring finalist(s) for an oral presentation. Evaluators will score the oral presentations(s), if any, and HBE may award the Contract based solely on the oral presentation.

**Cost Score**

The Vendor bidding the lowest total cost in Section 5, Cost Response, will receive the maximum points for a cost score. The total cost bid by other Vendors will be normalized with the low-cost bidder to produce a cost score for those vendors.

**Total Score**

SCORE	
REQUIREMENTS/CRITERIA	
Mandatory Requirements	<i>Pass/Fail</i>
	WEIGHT ASSIGNED
Experience of Vendor’s Proposed Team	40
Qualifications of Vendor’s Final Deliverable	40
Cost	20
TOTAL	100

HBE reserves the right to check any or all references and may choose to contact references only for the Vendor with the top score.

### **6.3. EVALUATION – ORAL PRESENTATIONS**

Oral presentations will consist of an interview with Vendors selected by HBE. HBE may require selected interview candidates to submit resumes or additional information to the RFQQ Coordinator. At the sole discretion of HBE, the ASV may be selected based upon the results of the interview(s).

### **6.4. NOTIFICATION TO PROPOSERS**

Firms whose responses have not been selected for award will be notified by e-mail.

## **7. POST AWARD**

### **7.1. OPTIONAL VENDOR DEBRIEFING**

Only Vendors who submit a Response may request an optional debriefing conference to discuss the evaluation of their Response. The requested debriefing conference shall occur on or before the date specified in Section 1.7: RFQQ Schedule. The request shall be in writing (e-mail acceptable) addressed to the RFQQ Coordinator.

The optional debriefing will not include any comparison between Vendor's Response and any other Responses submitted. However, the Exchange 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 solicitation requirements. The debriefing conference may take place in-person or by telephone.

A Vendor may submit a protest only after a debriefing conference has been both requested and held with that Vendor.

### **7.2. PROTEST PROCEDURES**

Vendors who have submitted a Response to this solicitation and have had a debriefing conference may make protests. Upon completion of the debriefing conference, a Vendor is allowed five (5) Business Days to file a formal protest of the solicitation with the RFQQ Coordinator.

#### **7.2.1. Grounds for Protest**

Protests may be made after HBE has announced the ASV and after the protesting Vendor has had a debriefing conference with the HBE. Protests may be made on only these grounds:

- Arithmetic errors were made in computing the score.
- The Exchange failed to follow procedures established in the solicitation document, or applicable state or federal laws or regulations; or
- There was bias, discrimination, or conflict of interest on the part of an evaluator.

Protests not based on these criteria will not be considered.

## 7.2.2. Protest Process

### A. Procedure

Protests are made to HBE after HBE has announced the ASV. Vendor protests shall be received, in writing, by HBE within five (5) Business Days after the Vendor debriefing conference.

### C. Format and Content

Vendors making a protest shall include in their written protest to HBE all facts and arguments upon which the Vendor relies, and shall be signed by a person authorized to bind the Vendor to a contractual relationship. Vendors shall, at a minimum, provide:

- Information about the protesting Vendor; name of firm, mailing address, phone number and name of individual responsible for submission of the protest;
- Information about the acquisition; the HBE reference number (15-002), acquisition method, the HBE Coordinator;
- Specific and complete statement of the HBE action(s) being protested;
- Specific reference to the grounds for the protest; and
- Description of the relief or corrective action requested.

### D. HBE Review Process

Upon receipt of a Vendor's protest, HBE will postpone signing a Contract with the ASV until the Vendor protest has been resolved.

HBE will perform an objective review of the protest, by individuals not involved in the acquisition process being protested. The review shall be based on the written protest material submitted by the Vendor and all other relevant facts known to HBE.

HBE will render a written decision to the Vendor within five (5) Business Days after receipt of the Vendor protest, unless more time is needed. The protesting Vendor shall be notified if additional time is necessary.

### E. HBE Determination

The final determination shall:

- 1) Find the protest lacking in merit and uphold the HBE's action;
- 2) Find only technical or harmless errors in the HBE's acquisition process conduct, determine the HBE to be in substantial compliance, and reject the protest;
- 3) Find merit in the protest and provide the HBE with options that may include:
  - a) Correct errors and reevaluate all Responses; or
  - b) Reissue the solicitation document; or
  - c) Make other findings and determine other courses of action as appropriate.
- 4) Not require the HBE to award the Contract to the protesting party or any other Vendor, regardless of the outcome.

F. The resulting decision is final; no further administrative appeal is available.

## EXHIBIT A-CERTIFICATIONS AND ASSURANCES

### Issued by the Washington Health Benefit Exchange

We make the following certifications and assurances as a required element of the Response, to which it is attached, affirming the truthfulness of the facts declared here and acknowledging that the continuing compliance with these statements and all requirements of the RFQQ are conditions precedent to the award or continuation of the resulting Contract.

The prices in this Response have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offer or competitor relating to (i) those prices, (ii) the intention to submit an offer, or (iii) the methods or factors used to calculate the prices offered. The prices in this Response have not been and will not be knowingly disclosed by the offer, directly or indirectly, to any other offer or competitor before Contract award unless otherwise required by law. No attempt has been made or will be made by the offer to induce any other concern to submit or not to submit an offer for the purpose of restricting competition. However, we may freely join with other persons or organizations for the purpose of presenting a single proposal or bid.

The attached Response is a firm offer for a period of 120 days following the Response Due Date specified in the RFQQ, and it may be accepted by HBE without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 120-day period. In the case of protest, your Response will remain valid for 180 days or until the protest is resolved, whichever is later.

In preparing this Response, we have not been assisted by any current or former employee of the Health Benefit Exchange or the state of Washington whose duties relate (or did relate) to the HBE's solicitation, or prospective Contract, and who was assisting in other than his or her official, public capacity. Neither does such a person nor any member of his or her immediate family have any financial interest in the outcome of this Response. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)

We understand that the HBE will not reimburse us for any costs incurred in the preparation of this Response. All Responses become the property of the HBE, and we claim no proprietary right to the ideas, writings, items or samples unless so stated in the Response. Submission of the attached Response constitutes an acceptance of the evaluation criteria and an agreement to abide by the procedures and all other administrative requirements described in the solicitation document.

We understand that any Contract awarded, as a result of this Response will incorporate all the solicitation requirements. Submission of a Response and execution of this Certifications and Assurances document certify our willingness to comply with the Contract terms and conditions appearing in Exhibit C, or substantially similar terms, if selected as a contractor. It is further understood that our standard contract will not be considered as a replacement for the terms and conditions appearing in Exhibit C of this RFQQ.

We (circle one) **are / are not** submitting proposed Contract exceptions (see Section 3.1.1.9).

\_\_\_\_\_  
Vendor Signature

\_\_\_\_\_  
Vendor Company Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

## **EXHIBIT B - RFQQ RESPONSE CONTENT**

3.1.1 Letter of Transmittal

3.1.2 Certifications and Assurances (Exhibit A; signed by authorized Vendor representative)

3.1.3 Vendor Response to RFQQ.

**Exhibit C – SAMPLE CONTRACT**

CONTRACT NO. HBE-XXX

**CONTRACT FOR PERSONAL SERVICES  
BETWEEN  
WASHINGTON HEALTH BENEFIT EXCHANGE  
AND  
[Name of Contractor]**