SBE 02: Illinois State-Based Exchange Information Technology and Customer Assistance Center Request for Proposals

**Offeror Response Template**

1. Proposal Cover Sheet

**STATE OF ILLINOIS**

**Department of Insurance**

**In Collaboration with**

**The Department of Healthcare and Family Services (HFS) and Department of Innovation and Technology (DoIT)**

Request for Proposals (RFP) #: SBE 02―IT/Call Center

**The Proposal of the Offeror identified below for the above-referenced RFP is submitted electronically and is comprised of separate files for the technical and cost proposals.**

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| --- |
| **Offeror Information** |
| Offeror Name |  |
| Offeror Mailing Address |  |
| Offeror Website |  |
| Offeror Contact Person |  |
| Offeror Person’s Phone Number |  |
| Offeror Person’s Facsimile Number |  |
| Offeror Person’s E-Mail Address |  |
| Offeror Federal ID Number |  |
| Offeror Vendor Number |  |
| **Submittals Enclosed and Separately Sealed** |
| [ ]  | Technical Proposal |
| [ ]  | Cost Proposal |

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Printed Name and Title Date

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Signature of an official authorized to bind the Offeror to the provisions contained in the Offeror’s Proposal.

1. Mandatory Qualifications to Submit an Offer

Fill in responses to the following questions, first replying with “Yes” or “No;” if the answer is “Yes,” provide additional details explaining how the Offeror meets the stated mandatory qualification from RFP Section 1.2:

* 1. The Offeror must be in operation for a minimum of ten (10) years. [ ]  Yes [ ]  No
		1. When did the Offeror start in business as the entity providing this Offer?
		2. Did the entity have prior names and/or a different structure? If so, list all names and structures, along with their start and end dates.
	2. The Offeror must have a minimum of ten (10) years of experience providing eligibility and enrollment technology Solutions. [ ]  Yes [ ]  No
		1. List the dates of the first go-live and the customer’s name for each customer in the ten-year (10-year) window.
	3. The Offeror, directly or through a single subcontractor, must have a minimum of four (4) years of experience providing Customer Assistance Center (CAC) implementation and operational services for health and human services programs. [ ]  Yes [ ]  No
		1. List the dates of the first CAC go-live and the customer’s name for each customer in the four-year (4-year) window.
	4. The Offeror must have experience providing technology implementation and operational services to more than one State-Based Exchange (SBE). [ ]  Yes [ ]  No
		1. List all states and years implemented.
	5. The Offeror must have experience providing CAC implementation and operational services to more than one SBE. Relevant experience supporting a Patient Protection and Affordable Care Act (ACA)-compliant health insurance exchange that is not an SBE may be substituted if necessary. [ ]  Yes [ ]  No
		1. List all states and years implemented.
	6. The Offeror must have demonstrated experience supporting a state’s transition off the FFE to an SBE. [ ]  Yes [ ]  No
		1. List all states and years in which the Offeror performed the FFE to SBE transition.
	7. The Offeror must have successfully implemented several SBE-specific requirements. These requirements include but are not limited to plan management, eligibility management in relation to marketplace and Medicaid coverage, system integration with Medicaid, marketplace access and experience management, enrollment assistance and management, customer support, and agent/broker and assister supports. [ ]  Yes [ ]  No
		1. List the states, dates, and major requirement areas delivered (plan management, eligibility management, system integration with Medicaid, marketplace access and experience, enrollment assistance, customer support, agent/broker/assister support, etc.).
	8. The Offeror’s Key Staff, collectively across all roles and project phases, must have experience leading and managing large-scale technology systems and CACs (“large-scale” is defined as a minimum of a $50M budget). [ ]  Yes [ ]  No
		1. Concisely list the names of all Key Staff with their role(s), corresponding phase(s), project(s), and overall budget.
	9. The Offeror’s Key Staff must also have eligibility and enrollment program and policy expertise with SBEs and Medicaid. [ ]  Yes [ ]  No
		1. As part of the response to 2.8 above, include a notation if a Key Staff member has direct SBE and/or Medicaid system implementation and support experience.
1. Required Forms for Offerors Not Registered in the Illinois Procurement Gateway

Offerors shall complete **Attachment C**, Offeror/Vendor Disclosure Form.

1. Required Forms for Offerors Registered in the Illinois Procurement Gateway

Offerors shall complete **Attachment D**, IPG Active Registered Offeror/Vendor Form.

1. Business Enterprise for Minorities, Women, and Persons with Disabilities Act Participation and Utilization Plan

Businesses included in Utilization Plans as meeting Business Enterprise for Minorities, Women, and Persons with Disabilities (BEP) requirements as prime vendors or subcontractors must be certified as BEP vendors prior to the Offer Opening Date. Go to [*https://cei.illinois.gov/*](https://cei.illinois.gov/) for complete requirements for BEP certification. Go to [*https://ceibep.diversitysoftware.com/*](https://ceibep.diversitysoftware.com/) to search for certified BEP vendors.

Offerors shall complete **Attachment E**, BEP Utilization Plan.

1. Technical Proposal
	1. **Summary**

Offerors must provide a description of their proposed Solution, not to exceed five pages including diagrams, where they clearly outline:

* The various components of the Solution;
* Which entity (including subcontractors) is the supplier of each component;
* How the Offeror will ensure that the various components will be interfaced to external systems (including to HFS, DoIT, and insurance carriers) and managed to function as an integrated information technology (IT) and business services Solution for Illinois’ SBE;
* A value proposition statement, not to exceed half a page, in which Offerors identify the features of their proposed Solution that, in the Offerors’ estimation, sets it apart from competitors; and
* Where services are to be performed.
	1. **General Requirements**

Offerors must describe their understanding of the requirements and constraints included in Section 7.1, General Requirements, of the RFP.

Offerors must describe how the Solution(s) being proposed meets or exceeds the requirements included in Section 7.1, General Requirements, of the RFP. If the Solution does not meet or exceed all specified requirements, explain what is not met and why.

Offerors must provide evidence that the Solution to all the requirements has already been deployed and functioning effectively and to the State’s satisfaction for the requirements in this section.

Offerors should proactively identify any missing requirements or constraints, as well as any requirements or constraints in need of modification or clarification.

Offerors must demonstrate their ability to support functionalities of the requirements included in Section 7.1, General Requirements, of the RFP, but should not include any associated costs in their cost proposal.

If Offerors cannot meet one or more of the stated requirements, Offerors must populate **Exhibit 6.2** below with their exception(s) to the corresponding requirement(s).

Exhibit 6.2. Exceptions: General Requirements (RFP Section 7.1)

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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* 1. **SBE Requirements**

Offerors must describe how the proposed Solution(s) meets or exceeds all the functional and technical requirements included in Section 7.2, SBE Requirements, of the RFP. Responses should include system architecture diagrams, interface diagrams, workflow diagrams, and examples of the Solution as appropriate. If the Solution does not meet or exceed all specified requirements, explain what is not met and why.

Offerors must provide evidence that the Solution to all the requirements has already been deployed and functioning effectively and to the State’s satisfaction for the requirements in this section.

Offerors must list any additional features and benefits related to this section that the Solution offered provides beyond the stated requirements.

Offerors must provide any additional explanations, reports, or other evidence that helps to convince the State that the proposed Solution is highly functional and low risk.

Offerors should proactively identify any missing requirements or constraints, as well as any requirements or constraints in need of modification or clarification.

Offerors must demonstrate their ability to support functionalities of the requirements included in Section 7.2, SBE Requirements, of the RFP, but should not include any associated costs in their cost proposal.

If Offerors cannot meet one or more of the stated requirements, Offerors must populate **Exhibit 6.3** below with their exception(s) to the corresponding requirement(s).

Exhibit 6.3. Exceptions: SBE Requirements (RFP Section 7.2)

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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* 1. **CAC Requirements**

Offerors must describe how the proposed Solution(s) meets or exceeds all the functional and technical requirements included in Section 7.3, CAC Requirements, of the RFP. Responses should include system architecture diagrams, interface diagrams, workflow diagrams, and examples of the Solution as appropriate. If the Solution does not meet or exceed all specified requirements, explain what is not met and why.

Offerors must provide evidence that the Solution to all the requirements has already been deployed and functioning effectively and to the State’s satisfaction for the requirements in this section.

Offerors must list any additional features and benefits related to this section that the Solution offered provides beyond the stated requirements.

Offerors must provide any additional explanations, reports, or other evidence that helps to convince the State that the proposed Solution is highly functional and low risk.

Offerors should proactively identify any missing requirements or constraints, as well as any requirements or constraints in need of modification or clarification.

Offerors must demonstrate their ability to support functionalities of the requirements included in Section 7.3, CAC Requirements, of the RFP, but should not include any associated costs in their cost proposal.

If Offerors cannot meet one or more of the stated requirements, Offerors must populate **Exhibit 6.4** below with their exception(s) to the corresponding requirement(s).

Exhibit 6.4. Exceptions: CAC Requirements (RFP Section 7.3)

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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* 1. **Mail Operations Requirements**

Offerors must describe how the proposed Solution(s) meets or exceeds all the requirements included in Section 7.4, Mail Operations Requirements, of the RFP. Responses should include system architecture diagrams, interface diagrams, workflow diagrams, and examples of the Solution as appropriate. If the Solution does not meet or exceed all specified requirements, explain what is not met and why.

Offerors must provide evidence that the Solution to all the requirements has already been deployed and functioning effectively and to the State’s satisfaction for the requirements in this section.

Offerors must list any additional features and benefits related to this section that the Solution offered provides beyond the stated requirements.

Offerors must provide any additional explanations, reports, or other evidence that helps to convince the State that the proposed Solution is highly functional and low risk.

Offerors should proactively identify any missing requirements or constraints, as well as any requirements or constraints in need of modification or clarification.

Offerors must demonstrate their ability to support functionalities of the requirements included in Section 7.4, Mail Operations Requirements, of the RFP, but should not include any associated costs in their cost proposal.

If Offerors cannot meet one or more of the stated requirements, Offerors must populate **Exhibit 6.5** below with their exception(s) to the corresponding requirement(s).

Exhibit 6.5. Exceptions: Mail Operations Requirements (RFP Section 7.4)

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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* 1. **Medicaid Alignment and Coordination Requirements**
		1. Offerors must describe their understanding of the Scope of Work (SOW) 2 implementation strategy and requirements included in Section 7.5, Medicaid Alignment and Coordination Requirements, of the RFP. Responses should include an explanation of their understanding of the differences between SOW1 and SOW2 requirements with respect to Medicaid alignment and coordination.
		2. Offerors must describe how the Solution(s) complies with the implementation of SOW2, as well as meets or exceeds the requirements included in Section 7.5, Medicaid Alignment and Coordination Requirements, of the RFP for SOW2. Responses should include diagrams and examples as appropriate.
		3. Offerors shall provide evidence of any experience implementing some or all of the requirements of SOW2, and the successes and challenges of that implementation, if available.

Offerors should proactively identify any missing requirements or constraints, as well as any requirements or constraints in need of modification or clarification.

Offerors must demonstrate their ability to support functionalities of the requirements included in Section 7.5, Medicaid Alignment and Coordination Requirements, of the RFP, but should not include any associated costs in their cost proposal.

* + 1. If Offerors cannot meet one or more of the stated requirements, Offerors must populate **Exhibit 6.6** below with their exception(s) to the corresponding requirement(s).

Exhibit 6.6. Exceptions: Medicaid Alignment and Coordination Requirements (RFP Section 7.5)

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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* 1. **Maintenance & Operations Requirements**
		1. Offerors must describe how the proposed Solution(s) meets or exceeds all the requirements included in section 7.6, Maintenance & Operations (M&O) Requirements, of the RFP. Responses should include diagrams and examples as appropriate. If the Solution does not meet or exceed all specified requirements, explain what is not met and why.
		2. Offerors must provide evidence that the Solution to all the requirements has already been deployed and functioning effectively and to the state’s satisfaction for the requirements in this section.
		3. Offerors must list any additional features and benefits related to this section that the Solution offered provides beyond the stated requirements.
		4. Offerors must Provide any additional explanations, reports, or other evidence that helps to convince the State that the proposed Solution is highly functional and low risk.

Offerors should proactively identify any missing requirements or constraints, as well as any requirements or constraints in need of modification or clarification.

Offerors must demonstrate their ability to support functionalities of the requirements included in Section 7.6, M&O Requirements, of the RFP, but should not include any associated costs in their cost proposal.

* + 1. If Offerors cannot meet one or more of the stated requirements, Offerors must populate Exhibit 6.7 below with their exception(s) to the corresponding requirement(s).

Exhibit 6.7. Exceptions: M&O Requirements (RFP Section 7.6)

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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* 1. **Key Personnel, Where Services Are To Be Performed**

Offerors must describe their understanding of the requirements included in Section 7.7, Key Personnel, of the RFP.

Offerors must identify Key Personnel being proposed as part of the RFP response. For each Key Personnel position, the Offeror must include the name, description of the role and responsibilities, percent of time allocated to the project, experience, and tenure with the Offeror (include **Exhibit 6.8.1** below). Include a brief bio of each Key Person that the Offeror has proposed and the location at which that Key Person will perform associated services. Offerors must also include resumes for each Key Person as attachments to the technical proposal. Offerors must identify each Key Person’s eligibility and enrollment program and policy expertise with SBEs and Medicaid.

The Offeror must include an organizational chart that includes all Key Personnel being proposed, as well as all functional entities required to perform the services and fulfill the requirements of the RFP. Offerors must indicate any subcontractor personnel or entities.

**Exhibit 6.8.1 Key Personnel (RFP Section 7.7)**

| Name | Project Role and Brief Description | Percentage of Time Allocated to the Project | Years of Experience | Previous Health Benefits Exchange Experience | Tenure with Supplier |
| --- | --- | --- | --- | --- | --- |
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In accordance with the requirements in Section 7.9, Where Services Are To Be Performed, of the RFP, the Offeror shall disclose all locations where services will be performed by the Offeror and all subcontractors, a description of the services performed in each location, and the known or anticipated percentage of services to be performed at each location. It shall be a breach of contract if the Offeror shifts any such work outside of the United States post-contract execution. Offerors may add additional lines for complete disclosure or provide an attachment in a substantially similar format.

Offerors should proactively identify any missing requirements or constraints, as well as any requirements or constraints in need of modification or clarification.

Offerors must demonstrate their ability to support functionalities of the requirements included in Section 7.7, Key Personnel, and Section 7.9, Where Services Are To Be Performed, of the RFP, but should not include any associated costs in their cost proposal.

* + 1. If Offerors cannot meet one or more of the stated requirements for Section 7.7, Key Personnel, and/or Section 7.9, Where Services Are To Be Performed, of the RFP, Offerors must populate **Exhibit 6.8.2** below with their exception(s) to the corresponding requirement(s).

Exhibit 6.8.2. Exceptions: Key Personnel, Where Services Are To Be Performed (RFP Sections 7.7, 7.9)

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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* 1. **Offeror/Staff Specifications, Experience, and Capabilities**

Prior Experience: Describe the Offeror’s (staff) knowledge and experience:

* + - 1. How many employees does the Offeror have who have experience with the Offeror’s products and services being offered under this RFP?
			2. What is the average, maximum, and minimum number of years that each Key Person has as an employee of the Offeror working on the products and services being offered under this RFP?
			3. For each Key Person listed, identify their total years of employment with the Offeror, the number of years of experience in the products and services related to this RFP, and other projects for which they held the same role as the role being proposed in response to this RFP (both as an employee of the Offeror or with another employer providing similar products and services).
			4. Have the Key Personnel identified for this project worked together before on a similar project as envisioned in this RFP? If yes, identify which Key Personnel have worked together before, on what project, for how long.
			5. Describe the number of projects and the Offeror’s role In implementing the following:
				1. An eligibility engine to assist customers in plan selection.
				2. Federal Medicaid eligibility requirements and rules.
				3. Drafting technical specifications for SBE using the Federal Platform (SBE-FP) and SBE technology and networking needs.
1. Qualifications

Provide three (3) specific client qualifications in the past five (5) years that showcase the Offeror’s ability in providing similar services for three (3) private- or public-sector clients.

* 1. **Qualifications Showcase**

Describe the Offeror’s experience with providing eligibility and enrollment technology Solutions.

Describe the Offeror’s experience with providing CAC implementation and operational services for health and human services programs.

Describe the Offeror’s experience with providing technology implementation and operational services to more than one SBE.

Describe the Offeror’s experience with providing CAC implementation and operational services to more than one SBE.

Describe the Offeror’s experience with supporting a state’s transition off the FFE to an SBE.

Describe the Offeror’s knowledge and successful implementation of several SBE-specific requirements, including but not limited to plan management, eligibility management in relation to marketplace and Medicaid/CHIP coverage, system integration with Medicaid, marketplace access and experience management, enrollment assistance and management, customer support, and agent/broker and assister supports.

Describe the Offeror’s experience leading and managing large-scale technology systems and CACs (“large-scale” is defined as a minimum of a $50M budget).

If Offerors cannot meet one or more of the stated requirements, Offerors must populate **Exhibit 7.1** below with their exception(s) to the corresponding requirement(s).

Exhibit 7.1. Exceptions: Qualifications Showcase

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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* 1. **Subcontracting**

Offerors must identify any and all subcontractors that will be performing any service, task, or requirement included in the RFP, in accordance with the requirements in section 7.8, Subcontracting, of the RFP. If the Offer includes any subcontractors, then the Offeror shall complete **Attachment C**, Offeror/Vendor Disclosure Form, for each subcontractor.

Offerors shall describe the names and addresses of all authorized subcontractors to be utilized in the performance of this contract, together with a description of the work to be performed by subcontractors and the anticipated amount of money that each subcontractor is expected to receive pursuant to this contract. The response should include Subcontractor Name, Anticipated/Estimated Amount to Be Paid, Address, and Description of Work.

Offerors must acknowledge understanding and agreement with all subcontractor terms and conditions included in Section 9, Contractual Terms, of the RFP. Offerors should note exceptions to terms included in this section in their response and provide a rationale for each exception.

* + 1. If Offerors cannot meet one or more of the stated requirements, Offerors must populate **Exhibit 7.2** below with their exception(s) to the corresponding requirement(s).

Exhibit 7.2. Exceptions: Subcontracting (RFP Sections 7.8, 9)

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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* 1. **Terms and Conditions Adherence**

Offerors must acknowledge understanding and agreement with all terms and conditions included in Section 9, Contractual Terms, of the RFP. Offerors should note exceptions to terms included in this section in their response and provide a rationale for each exception.

* + 1. If Offerors cannot meet one or more of the stated requirements, Offerors must populate **Exhibit 7.3** below with their exception(s) to the corresponding requirement(s).

Exhibit 7.3. Exceptions: Terms and Conditions Adherence (RFP Section 9)

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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* 1. **Timeline, Tasks, and Deliverables**

Offerors must describe their understanding of the requirements and constraints included in Section 10, Timeline, Tasks, and Deliverables, of the RFP.

Offerors must describe their approach (i.e., “how”) for meeting or exceeding the requirements included in Section 10, Timeline, Tasks, and Deliverables, of the RFP.

* + 1. If Offerors cannot meet one or more of the stated requirements, Offerors must populate **Exhibit 7.4** below with their exception(s) to the corresponding requirement(s).

Exhibit 7.4. Exceptions: Timeline, Tasks, and Deliverables (RFP Section 10)

| RFP Section | RFP Page # | RFP Requirement | Description of Exception |
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