

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT			1. Contract Number	Page of Pages 1 1	
2. Amendment/Modification Number 2		3. Effective Date 5/3/13		4. Requisition/Purchase Request No.	
5. Solicitation Caption: DC HBX Contact Center					
6. Issued By: District of Columbia Health Benefit Exchange Authority 441 4th Street NW Suite 870N Washington, DC 20001		7. Administered By (If other than line 6)			
8. Name and Address of Contractor (No. Street, city, country, state and ZIP Code)		9A. Amendment of Solicitation No. DCHBX-13-0001		9B. Dated (See Item 11) 4/15/13	
		10A. Modification of Contract/Order No.			
Code		Facility			
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS					
<input checked="" type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers <input type="checkbox"/> is extended. <input checked="" type="checkbox"/> is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning <u>one</u> copies of the amendment: (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or fax which includes a reference to the solicitation and amendment number. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by letter or fax, provided each letter or telegram makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.					
12. Accounting and Appropriation Data (If Required)					
13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14					
A. This change order is issued pursuant to: 27 DCMR 3601.2 (c)					
The changes set forth in Item 14 are made in the contract/order no. in item 10A.					
B. The above numbered contract/order is modified to reflect the administrative changes (such as changes in paying office, appropriation date, etc.) set forth in item 14, pursuant to the authority of 27 DCMR, Chapter 36, Section 3601.2.					
C. This supplemental agreement is entered into pursuant to authority of: 27 DCMR Section 2008 and 3601.2 (c)					
D. Other (Specify type of modification and authority)					
E. IMPORTANT: Contractor <input type="checkbox"/> is not, <input checked="" type="checkbox"/> is required to sign this document and return <u>1</u> copies to the issuing office.					
14. Description of amendment/modification (Organized by UCF Section headings, including solicitation/contract subject matter where feasible.)					
1. See attached pages 1-8 for specific amendments.					
2. All other terms and conditions remain unchanged.					
Except as provided herein, all terms and conditions of the document referenced in Item (9A or 10A) remain unchanged and in full force and effect					
15A. Name and Title of Signer (Type or print)			16A. Name of Contracting Officer Mila Kofman		
15B. Name of Contractor		15C. Date Signed		16B. District of Columbia [signed]	
(Signature of person authorized to sign)				16C. Date Signed 5/3/13	
				(Signature of Contracting Officer)	

DCHBX-13-0001
Amendment 2

1. Remove item 9 regarding E-Sourcing from the cover page, “Solicitation, Offer, and Award.”
2. Replace Section B with the content on pages 5-7 of this document.
3. Replace Section C.1.1 with the following:
2100MLK 2100 Martin Luther King Ave, SE, Washington, DC 20020, is the address of the primary ECC facility. This facility is provided by the Government of the District of Columbia with space for up to 60 vendor-provided ECC Staff.
4. Replace Section C.5.1.1.1 with the following:
The ECC shall be available to receive and respond to inquiries from 8:00 a.m. to 8:00 p.m. Eastern Time, Monday-Friday, excluding Federal holidays and District government holidays (“standard hours”). During open enrollment periods (October 1, 2013-March 31, 2014, and in subsequent years October 15-December 7, as defined by the ACA and its related regulations, including 45 C.F.R. § 155.410) the ECC will be open 24 hours a day seven days a week. During standard hours, the 2100MLK facility will be the primary facility in operation.
5. Replace Section C.5.3 with the following:

C.5.3 Customer Service Representatives

C.5.3.1 Contractor shall ensure that CSRs have the skills and experience necessary to meet the job requirements. Contractor shall hire CSRs who:

- Have excellent verbal and vocal skills (proper grammar, dialect neutral, tone, volume, rate, sentence structure, use of positive language, and transitions). These are bona fide occupational qualifications.
- Preference for resident of the District of Columbia
- Have exceptional listening, questioning, and call control techniques
- Have exceptional writing skills and technical acumen
- Have strong computer and technical skills
- Have experience with the Internet and various web browsers
- Have excellent customer service skills in both written and verbal communication

- Can answer phones professionally and respond to telephone inquiries using available resources
- Have the ability to compose professional correspondence without requiring additional training
- Can identify and appropriately escalate priority issues and route inquiries to appropriate resources
- Have the ability to accurately and efficiently process information and tasks
- Have the ability to handle challenging telephone and customer service situations
- Have cultural and age sensitivity in order to effectively handle the needs of customers

C.5.3.2 Contractor shall ensure that all CSRs are cross-trained to handle written, verbal, and online inquiries.

C.5.3.3 Contractor shall develop and administer evaluative testing for prospective hires that screen for the above attributes as well as for the ability to rapidly learn and apply contact center procedures, problem solve and respond to customer needs, and develop quick customer rapport. The Authority will have the right to review the evaluation scores of prospective hires, prior to hiring, and to set a minimum test performance metric for the test results.

6. Replace Section C.5.6.7.1 with the following:
The deadline for the D&I phase of the contract is October 1, 2013. This means that the Contact Center must be fully operational and ready to accept and address all contact channels and all types of consumer inquiries beginning on October 1. During the Development and Implementation phase, the Contact Center must also provide CSR staff to begin receiving pre-enrollment and general consumer inquiries during standard operating hours, 50 calendar days after the award of the contract.
7. Replace Section C.5.8.1.1 with the following:
Contractor shall utilize the District-provided facility at 2100 Martin Luther King Jr. Blvd, SE in the District, as its primary facility. This location co-locates with a Department of Human Services Service Center and is well-served by the city's DC-Net telephony and networking infrastructure. 2100MLK is public-transit accessible with major subway and bus routes within walking distance, and convenient to highways and National Airport. The facility is designed to hold up to 60 vendor-employed Exchange Call Center CSRs and CSMs, and includes all furniture, telephones, computers and other necessary infrastructure for operations.

8. Replace Sections I.10 through I.12 with the content on page 7.
9. Replace L.2.1 with the following:
 One original and seven (7) copies of the written proposals shall be submitted in two parts, titled “Technical Proposal” and “Price Proposal.” In addition, proposals shall be submitted electronically via USB thumb drive. Telephonic, telegraphic, and facsimile proposals will not be accepted. Proposals shall be typewritten in 12 point font size on 8.5” by 11” bond paper. Tables, graphics and other exhibits can be in 10-point font. The Work Plan can be on paper up to 11” x 17”, folded, Each proposal shall be submitted in a sealed envelope conspicuously marked: “Proposal in Response to Solicitation No. DCHBX-13-0001– Health Insurance Exchange Contact Center”.

Submission Address:
 DCHBX-13-001
 DC Health Benefits Exchange Authority
 441 4th Street, NW – Suite 870N
 Washington, DC 20001

10. Replace Section L.13 Acknowledgment of Amendments with the following:
 The Offeror shall acknowledge receipt of any amendment to this solicitation on Page 1, item 11, the “Solicitation, Offer and Award” cover page of the Offer. The Authority must receive the acknowledgment by the date and time specified for receipt of proposals. An Offeror’s failure to acknowledge an amendment may result in rejection of its offer.
11. Replace Section M.3.5 with the following:
M.3.5 Price Proposal (20 Points Maximum)
 M.3.5.1 The price evaluation will be objective and will be evaluated separately from the technical proposal. The Offeror with the lowest price will receive the maximum price points. All other proposals will receive a proportionately lower total score. The following formula will be used to determine each Offeror’s evaluated price score:

$$\frac{\text{Lowest price proposal}}{\text{Price of proposal being evaluated}} \times 20 = \text{Evaluated price score}$$

12. In Attachment 2 – Performance Metrics, Definitions list. For the final definition, for Unhandled Calls, replace the text with:
 An **Unhandled Call** is a call where the caller selects an option to speak with a CSR, but the call is not handled by a CSR. The term Unhandled Call includes, but is not limited to, abandoned calls and disconnections
13. In Attachment 2 – Performance Metrics, Telephone Inquiries Table. Replace the line on the Metric for Unhandled Calls with the following:

Metric: Unhandled Calls

Target: 3.5% unhandled call (upper limit)

Liquidated damages: \$500 per week per exceeded unhandled call range

14. In Attachment 2 – Performance Metrics, Written Letters, Faxes, E-mails and Web Complaints Table. Replace the table with the following:

Channel	Metric	Target	Liquidated Damages
Written Letters	% of written correspondence responded to	80% in 30 business days 100% in 45 business days	\$100/day for each late response
Faxes	% of faxes responded to	100% in two business days	\$100/day for each late response
Email	% of email responded to	100% in two business days	\$100/day for each late response
Web Complaints	% of web complaints responded to	80% in one business day 100% in two business days	\$100/day for each late response

Where the written communication comes in, in a language other than English, an additional four business days is added to the target in all cases.

15. In Attachment 2 – Performance Metrics, Security and Compliance with Laws. Under the “Security Certification” Indicator, the Definition shall be replaced with: “Security certifications are maintained as required by the Authority.”
16. In Attachment 2 – Performance Metrics, Business Continuity. The second SLA shall be replaced with “Notifications contain all of the necessary Data Elements as defined by the Authority.
17. In Attachment 3 – Contract Deliverables, Table 1: Startup Plans, add the following two items:
Deliverable: Overflow Facility Cost Benefit Analysis
Due Date: Due within 14 days of award
Liquidated Damages: \$2,500/day

Deliverable: Overflow Facility Floor Plan
Due Date: Due within 14 days of award
Liquidated Damages: \$2,500/day
18. RFP is amended with the addition of Attachment 5, Floor Plan and Desktop Technology.
19. RFP is amended with the addition of Attachment 6, Cost/Price Data Requirements.

**SECTION B
SUPPLIES OR SERVICE AND PRICE/COST**

B.1 The DC Health Benefit Exchange Authority is seeking a contractor design, staff, train customer service representatives, and operate a contact center supporting individuals who are enrolling in and paying for health insurance through the District’s Exchange.

B.2 CONTRACT TYPE

The Authority will issue a requirements contract based on a fixed monthly price for Operations and Management, a fixed price for Development and Implementation, and a fixed price for optional tasks 1 and 2.

B.3 ASSUMPTIONS

Acknowledging that the Exchange Contact Center is a new function for the Government of the District of Columbia, serving a new program that operates under the new federal ACA law related to health insurance coverage, it is not possible to make a confident projection about contact volume. However, with this caveat, the following table provides an initial projected call volume that the Authority has developed.

Estimated DC Exchange Contact Center Call Volume in First Year – CSR Contacts

	Scenario I – Low Volume	Scenario II – Medium Volume	Scenario III – High Volume
Core Function			
General Assistance	54,835	109,668	164,503
Eligibility	23,347	46,693	70,040
Enrollment	50,750	101,500	152,250
SHOP	2,232	4,464	6,694
Calls/Month (Total/12)	10,930	21,860	32,790

For the purposes of price estimation, we ask that all Offerors assume that call volume will remain relatively steady month to month.

For the purposes of price estimation, we ask that all Offerors assume an Average Handle Time of 17 minutes throughout the year.

B.4 PRICE SCHEDULE

BASE YEAR D&I and Optional Tasks (Date of Award through September 30, 2014)

Contract Line Item No.	Deliverable	Total Price
1001	Development & Implementation	\$
1002	Optional Task/Special Services – non-MAGI Determination	\$
1003	Optional Service – Web Chat	\$
Total		\$

BASE YEAR OPERATIONS AND MANAGEMENT (October 1, 2013 through Sept. 30, 2014)

Contract Line Item No.	Deliverable	Scenario I 10,930 Calls/Month	Scenario II 21,860 Calls/Month	Scenario III 32,790 Calls/Month
1004	Operations & Management	\$ /Month	\$ /Month	\$ /Month

OPTION YEAR 1 (October 1, 2014 through September 30, 2015)

Contract Line Item No.	Deliverable	Scenario I 10,930 Calls/Month	Scenario II 21,860 Calls/Month	Scenario III 32,790 Calls/Month
2001	Operations & Management	\$ /Month	\$ /Month	\$ /Month

Contract Line Item No.	Deliverable	Total Price
2002	Optional Task – Web Chat	\$

OPTION YEAR 2 (October 1, 2015 through September 30, 2016)

Contract Line Item No.	Deliverable	Scenario I 10,930 Calls/Month	Scenario II 21,860 Calls/Month	Scenario III 32,790 Calls/Month
3001	Operations & Management	\$ /Month	\$ /Month	\$ /Month

Contract Line Item No.	Deliverable	Total Price
3002	Optional Task – Web Chat	\$

OPTION YEAR 3 (October 1, 2016 through September 30, 2017)

Contract Line Item No.	Deliverable	Scenario I 10,930 Calls/Month	Scenario II 21,860 Calls/Month	Scenario III 32,790 Calls/Month
4001	Operations & Management	\$ /Month	\$ /Month	\$ /Month

Contract Line Item No.	Deliverable	Total Price
4002	Optional Task – Web Chat	\$

B.5 COST AND PRICE PROPOSAL

Provide a detailed cost and price proposal. For the Development & Implementation (D&I) phase of the Contract, Offerors should tie their price breakout to specific milestones that will be listed in the work plan and timeline. If the Offeror is chosen for implementation, the Contract may reference payment for these specific milestones.

Offeror must submit detailed cost data including staffing, salary, indirect cost rates, proposed rates of profit, along with other cost assumptions used in developing its pricing. Offerors should use the Cost /Price Data Requirements Attachment 6 as guidance for this submission.

For the Operations & Management (O&M) phase of the Contract, Offerors should tie their price breakout to labor and other recurring costs. Offerors may not shift costs or prices between milestones, or shift costs or prices between D&I and O&M.

- B.6 An offeror responding to this solicitation must submit with its proposal, a notarized statement detailing any subcontracting plan required by law. Proposals responding to this RFP shall be deemed nonresponsive and shall be rejected if the offeror fails to submit a subcontracting plan that is required by law. For contracts in excess of \$250,000, at least 35% of the dollar volume of the contract shall be subcontracted in accordance with section H.9.1.

I.10 SECURITY AND BACKGROUND CHECKS

Due to the sensitive nature of the information and system that the Contractor will be supporting, a background and reference check must be performed on all personnel and employees who are assigned to work on this contract. The Contractor shall not assign anyone to work on this contract and shall immediately remove from work anyone on this contract who has been convicted within the past seven years for fraud or any felony or who is currently under an arrest warrant. Any exception of this policy shall be discussed and approved in writing by Authority to the Contractor.

The background check must be returned in a favorable status prior to employees commencing work under the contract. Results must be provided to the Authority in a sealed un-opened envelope. The costs of the background check will be paid directly by the Contractor.

I.11 ORDER OF PRECEDENCE

The contract awarded as a result of this RFP will contain the following clause:

ORDER OF PRECEDENCE

A conflict in language shall be resolved by giving precedence to the document in the highest order of priority that contains language addressing the issue in question. The following documents are incorporated into the contract by reference and made a part of the contract in the following order of precedence:

- (1) An applicable Court Order, if any
- (2) Contract document
- (3) Standard Contract Provisions
- (4) Contract attachments other than the Standard Contract Provisions
- (5) RFP, as amended
- (6) BAFOs (in order of most recent to earliest)
- (7) Proposal

I.12 CONTRACTS IN EXCESS OF ONE MILLION DOLLARS

Any contract in excess of \$1,000,000 shall not be binding or give rise to any claim or demand against the District until approved by the Council of the District of Columbia and signed by the CO.

I.13 GOVERNING LAW

This contract, and any disputes arising out of or related to this contract, shall be governed by, and construed in accordance with, the laws of the District of Columbia.