Request for Information (RFI) 2019-01

Covered California Workforce Management

Addendum # 1 - February 22, 2019

Addendum #1 revises

Document	Section	Changes
Attachment A- Vendor Questions	Attachments	Added Question #13.

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Request for Information - RFI 2019-01 Covered California Workforce Management

1. PURPOSE:

The purpose of this Request for Information (RFI) 2019-01 is to gather information on potential software and services available to Covered California (the Agency) and:

- Determine the level of interest in the upcoming procurement for Workforce Engagement Management (WEM).
- Receive feedback on questions and potential issues.
- Gather information on systems and new trends for WEM Solutions appropriate for the size and complexity of the Agency.

With this RFI we request information regarding your company, rates, and products/services for implementing a WEM solution at Covered California. As a result of the RFI process, Covered California expects to develop a project budget and competitive solicitation document. All companies who respond to this RFI will be included on the vendor list to receive notice of the anticipated future final solicitation document and offered a chance to bid on the software and services. Therefore, information gathered as a result of this RFI may be used in the development of any upcoming Request for Proposals (RFP) for software and services. The RFI responses will also be utilized to assist the Agency in identifying and understanding potential issues and risks related to a future RFP.

2. KEY ACTION DATES AND TIMES:

Listed below in Table 1 are the RFI Key Action Dates, which indicate when actions should be taken or completed. If the Agency finds it necessary to change any of these dates, an addendum or an updated RFI will be posted on the following website: http://hbex.coveredca.com/solicitations

TABLE 1: KEY ACTION DATES

Event	Date and Time
Release the RFI	Tuesday, February 19, 2019
Last Day to Submit Questions	Monday, February 25, 2019
Last Day for Submission of Answer(s)	Friday March 1, 2019
RFI Response Due Date	Friday March 15, 2019
Demonstration of Solution (selected vendors at the Agency's discretion)	April 2 -5, 2019

3. UNDERSTANDING COVERED CALIFORNIA

Soon after the passage of national health care reform through the Patient Protection and Affordable Care Act of 2010 (ACA), California became the first state to enact legislation to establish a qualified health benefit exchange. The California state law is referred to as the California Patient Protection and Affordable Care Act (CA-ACA).

The goals and objectives of the Agency are to:

- Reduce the number of uninsured Californians by creating an organized, transparent marketplace for Californians to purchase affordable, quality health care coverage, to claim available federal tax credits and cost-sharing subsidies, and to meet the personal responsibility requirements imposed under the ACA;

- Strengthen the health care delivery system;

- Serve as an active purchaser, including creating competitive processes to select participating carriers and other contractors;

- Require that health care service plans and health insurers issue coverage in the individual and small employer markets and compete on the basis of price, quality, and service, and not on risk selection; and

- Meet federal and state law requirements, guidance and regulations.

The Agency is an independent public entity within California State government. It is governed by a five-member board appointed by the governor and legislature.

The Agency works in close partnership with:

- The Department of Health Care Services, which oversees and administers California's Medicaid Program (Medi-Cal) and other specifically-focused health programs;

- The two agencies that regulate health insurance in California, the Department of Managed Health Care and Department of Insurance; and

- A broad range of stakeholders whose constituencies will be impacted by health care reform.

For additional information on the Agency, please refer to the consumer website at: www.CoveredCA.com.

4. CURRENT SOLUTION

Currently the California Health Benefit Exchange Unified Communications and Unified Contact Center (UCCE) supports Service Center Representatives, (referred to as Agents) located in Rancho Cordova, Fresno, and a Faneuil-operated location used as an outsource contact center for overflow. The service is built on the Cisco Hosted Collaboration Solution (HCS) foundation which is a standardized, robust, and feature rich set of applications to provide clients a fully functional Unified Communications and Unified Contact Center hosted solution for all aspects of voice, collaboration, and contact center applications. It is integrated with Cisco Hosted Collaboration Solution, so customers can tap into multiple applications and services on one converged platform.

Feature and functionality supported by the current solution include:
- IP contact center
    - Cisco Intelligent Contact Management (ICM)
    - Cisco Customer Voice Portal (CVP)
    - Cisco Unified Communications Manager (CUCM)
- Intelligent contact routing with Cisco Precision Routing and/or Skill Groups
- Outbound Option
- Multisite support
- Agent greeting
- Whisper announcement
- Prompt and collection of State data CVP
- Self-service IVR applications with CVP
- Courtesy Callback with CVP
- Standard computer-telephony-integration (CTI) desktop
- Customizable desktop with CTI toolkit
- Next-generation agent and supervisor desktop with Cisco Finesse desktop software
- Web 2.0-based reporting with Cisco Unified Intelligent Center
- Third-party integration for the following:
    - Call recording
    - Workforce Management
    - Customer relationship management (CRM) using a variety of prebuilt connectors or customized and developed connectors Custom Wallboards Web Service Integrations
    - Database integration
    - Speech Applications
- Text-to-Speech
- Reporting

Average staffing sized range from 700 SCRs during the off season to 2000 during peak season. Call volumes range between 400 – 1.3 million per month, with an average 17-19 minute handle time.

5. CONCEPTUAL SOLUTION / PROPOSED SERVICES

Workforce Engagement Management (WEM) is a tool to be used in conjunction with our Agents and Supervisors. WEM supports supervisors and managers to provide the ability to forecast contact volumes and workload as well as staffing needs, take immediate action, plan evaluations, and make adjustments to optimize contact center team performance - the key to increasing customer satisfaction. WEM allows the scheduling of multiple queues and sites. It also allows the managing of key performance indicators and real-time adherence to schedules. WEM retrieves historical call volume information and uses this information to define the contact center call distribution for a queue. WEM provides that ability to alter call distribution for special events (For example a government holiday or Open Enrollment) that might artificially affect the historically anticipated call volume.

WEM allows the contact center to define work conditions for Agents and teams. An unlimited number of working conditions may be created through the WEM interface to take into account the different work conditions required by the contact center. Call Center managers track forecasts throughout the day to see if there is any risk of understaffing or overstaffing based on contact activity levels. Adherence allows supervisors and managers to track Agents compliance with their schedule in real-time and historical reports tracking Agent adherence over time.

Agents use WEM to check their inbox, trade work shifts, view their schedules, post trades on the bulletin board, review their productivity and statistics, and request vacations. Agents have the ability to monitor their own productivity indicators on a daily basis to keep their performance on track.

Quality Management (QM) allows the Agency to review and assess the performance levels (KPI's) of individual Agents and teams, by setting business-driven parameters which automatically pinpoint and record the most relevant calls, providing optimal insight into service performance.

QM software allows additional reporting calls using an extensive library of call, customer and business-related metadata. The intuitive user provides the ability to analyze business KPI's through tailored evaluation forms/customized scorecards.
QM software includes voice and screen playback and evaluation tools that are unified, clear, and enable the evaluators to choose from a library of evaluation forms that fit the program. Forms include question level weighting, evaluator hints and KPI questions, which allow critical errors to "fail" the Agent in the overall evaluation. QM software includes the ability to customize reports and provide insight into quality scores for individuals, teams and groups.

Covered California has had a number of challenges related to the current WFM tool and feels that the complexity of our WFM and QM processes, and our operational scale, warrants a solution with greater capabilities and more flexible configurations. Covered

California is seeking a best-in-class comprehensive solution suite that can support our operational size and complexity. Covered California is open to cloud-based solutions and has outlined key requirements in Attachment B, Vendor Checklist.

6. Vendor Questions

Vendors must submit questions regarding this RFI via e-mail by the specified date and time in Section 2, RFI Key Action Dates and Times. Questions should be submitted via email to the contact person listed in the RFI Format and Submission section.

The following **must be included** in the e-mail inquiry:

- On the subject line of the e-mail, include: RFI #2019-01 Covered California Workforce Management - Vendor Questions.
- Vendor name, contact person, telephone number, and e-mail address, as part of the sender's contact information.
- A description of the subject or issue in question, or discrepancy found in the RFI.
- RFI section, page number, and/or other information useful in identifying the specific problem or issue in question.
- The vendor's question(s).

At its discretion, the State may contact vendors to seek clarification of any inquiry received. The State may respond to questions directly to the vendor or if deemed necessary, release an addendum or updated RFI.

7. RFI Format and Submission

Responses to this RFI are due by the date and time stated in Section 2, RFI Key Action Dates and Times.

Responses must be submitted via e-mail to the State's contact identified below, and must include the following information in the e-mail subject line: RFI #2019-01 Covered California Workforce Management

The RFI responses and all correspondence and/or questions related to this RFI shall be directed to the Agency Representative:

Megan Paquin
Covered California, Information Technology Division
(916) 228-8643
Megan.Paquin@covered.ca.gov

A vendor's response shall contain the following:

1. A signed cover letter that includes the following elements:

     a. Vendor name, address, and telephone number.

     b. Contact information including the name, title, address, phone number, and e-mail address of the vendor's primary contact person for this RFI.

2. A narrative no more than four pages describing the following:

     a. The vendor's primary business focus, areas of expertise, certifications and/or credentials relevant to the content of this RFI, and experience with similar systems.

     b. The vendor's experience doing business with the State of California.

     c. The vendor's experience doing business with state-based exchanges.

     d. The vendor's experience doing business with health care organizations.

     e. The vendor's experience doing business with public and private sector customer engagement center(s).

3. The vendor's response to Attachment A, Vendor Questions. Please ensure that the format and numbering of the response correlates to that within Attachment A.

4. The vendor's response to Attachment B, Vendor Checklist.

5. While not required, vendors are encouraged to answer all questions. If a vendor elects not to respond to a question, please provide feedback on why.

6. Any additional recommendations that the vendor might find relevant to the upcoming WFM effort.

7. The total response to all inquiries in this section should not exceed 45 pages. Attachment B, collateral, and other marketing materials are not included in the page limit.

8. Demonstration

After receiving all RFI responses Covered California will request a live in-person demo of the WEM Solution from vendors selected per Covered California's discretion based on the RFI responses.

9. RFI Disclaimer

This RFI is issued for information and planning purposes only and does not constitute a solicitation. A response to this RFI is not an offer and cannot be accepted by the State to form a binding contract. Responders are solely responsible for all expenses associated with responding to this RFI.

Responses to this RFI will not be shared with other vendors until after the contract award that results from the above-mentioned process.