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# NOTICE OF COMPETITIVE SOLICITATION

**HCA Solicitation #2022HCA11**

**SOLICITATION TITLE**: Administration of Tax-Advantaged Accounts

**SOLICITATION BUDGET:** N/A

**SOLICITATION POSTING DATE:** 6/7/2022

**RESPONSE DUE DATE:** 8/4/2022

**Find the full solicitation on** [Washington’s Electronic Business Solution (WEBS)](https://pr-webs-vendor.des.wa.gov/). Vendors not registered in WEBS will not receive updates or amendments to the solicitation, which may put them at a disadvantage.

**Estimated Schedule of Procurement Activities**

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| Issue Request for Proposals | June 7, 2022 |
| Letter of Intent Due | June 17, 2022 – 2:00 p.m. PT |
| Pre-Proposal Conference | June 23, 2022 – 10:00 a.m. PT |
| 1st Round Bidder Questions Due | June 24, 2022 – 2:00 p.m. PT |
| 1st Round Answers Posted**\*** | July 1, 2022 |
| Interested Subcontractor Responses Due | July 5, 2022 |
| Interested Subcontractor List Posted\* | July 8, 2022 |
| 2nd Round Bidder Questions Due | July 11, 2022 – 2:00 p.m. PT |
| 2nd Round Answers Posted**\*** | July 18, 2022 |
| Complaints Due (if applicable) | July 28, 2022 – 5:00 p.m. PT |
| Proposals Due | August 4, 2022 – 2:00 p.m. PT |
| Phase 1 Evaluation Period**\*** | August 8, 2022 – August 19, 2022 |
| Phase 2 Evaluation Period\* | August 22, 2022 – September 5, 2022 |
| Conduct Oral Interviews with Finalists, if required\* | September 12, 2022 – September 16, 2022 |
| Announce “Apparent Successful Bidder” via WEBS\* | September 23, 2022 |
| Debrief Request Deadline (*3 Business Days after the ASB announcement*) | September 28, 2022 – 5:00 p.m. PT |
| Negotiate Contract | November 2022 – January 2023 |
| Begin Implementation | February 1, 2023 |
| Complete Security Design Review | July 1, 2023 |
| Benefits Start Date | January 1, 2024 |

**Purpose and Objectives**

The Washington State Health Care Authority (HCA) is initiating this Request for Proposals (RFP) to solicit proposals from Administrators interested in providing and administering tax-advantaged accounts for Participants of the Public Employees Benefits Board (PEBB) and School Employees Benefits Board (SEBB) Programs and other designated HCA programs. HCA launched RFI 4192 on this topic on January 15, 2020, to gain a greater understanding of the marketplace and offerings; participation in RFI 4192 was not required for participation in this RFP.

It is possible that during the term of any Contract resulting from this RFP that HCA may be required or provided the opportunity to administer other programs (Future Programs). If that occurs, it is possible that (i) one (1) or more of the existing programs will be replaced with a Future Program, and/or (ii) that some Participants are required to transition from an existing program to a Future Program. Regardless, it is the intent of HCA that the accounts described in this RFP and in any resulting Contract be made available to any eligible Participants of any Future Program. Therefore, all references to the PEBB, SEBB or COFA Islander Programs include any Future Program that includes other Washington State Participants.

It is also possible that during the term of any Contract resulting from this RFP that HCA may be required or provided the opportunity to administer future product lines (Future Products). If that occurs, it is possible that (i) one (1) or more of the existing products will be replaced with a Future Product, and/or (ii) that some Participants are required to transition from an existing product to a Future Product. Regardless, it is the intent of HCA that the accounts described in this RFP and in any resulting Contract be made available to any eligible Participants of any Future Product. Therefore, all references to the PEBB, SEBB or COFA Islander Programs include any Future Product that includes other Washington State Participants.

HCA intends to award one Contract to provide the services described in this RFP. In the future, it is possible that the contract resulting from this RFP may also include the administration of Health Saving Accounts (HSAs), though such plans are not immediately under development. While developing Bids, Bidders should consider that this account type is not the focus of the solicitation. Furthermore, HCA is not obligated to add HSAs as a part of the complement of contracted services during the term of the Contract.

HCA will select one Apparent Successful Bidder (ASB) that demonstrates:

1. The ability to serve and effectively manage tens of thousands of Participants and hundreds of employers (public entities and school districts) throughout each annual business cycle.
2. Competitive rates which can be adjusted downward as participation and efficiencies increase.
3. Participant enrollment services and ongoing engagement facilitated by online access, claiming options and data security.

Bidders must demonstrate the ability to provide all staffing, systems, and procedures required to perform the services described in this RFP. They must have the ability to meet the needs of the PEBB and SEBB Programs and the COFA Islander Programs and demonstrate a culture of flexibility, innovation, and adaptability to develop and administer affordable and consumer-friendly tax-advantaged accounts.

**Minimum Qualifications**

The following are the minimum qualifications for Bidders:

1. Must be licensed to do business in the State of Washington with an issued UBI number or provide a commitment that the Administrator will be licensed in Washington within 30 days of being selected as the ASB.
2. Must comply with all state and federal privacy and security laws, statues, and regulations for protecting Participant data, including HIPAA.
3. 10 years’ experience administering tax-advantaged accounts (i.e., Medical FSA, DCAP, HSA).
4. 5 years’ experience administering tax-advantaged accounts for a public entity.
5. 5 years’ experience administering at least the minimum number of accounts for all the account types as listed below for a single client.

Note: the client does not need to be the same client for each account type. For example, Bidder cannot combine the count of Medical FSAs from two (2) or more clients to reach the 20,000 account threshold, but Bidder can use one (1) client to meet the Medical FSA threshold and a different client to meet the HSA account threshold.

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| --- | --- | --- | --- | --- |
| Single client total account minimum of | Medical FSA | DCAP | Limited Purpose FSA | HSA |
| 20,000 | 1,500 | 200 | 3,000 |

1. Must be able to complete and pass a Security Design Review by the Complete Security Design date provided in Section 1.2, ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES. An example checklist is provided in Attachment 3, *Security Design Review Checklist*.

**Solicitation Coordinator**

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| Name | **Julia Jacobs** |
| E-Mail Address | [HCAProcurements@hca.wa.gov](mailto:HCAProcurements@hca.wa.gov) |

**WEBS Commodity Codes**:

* 918-40-Employee Benefits Consulting
* 946-10-Accounting and Billing Services (Including Payroll Services, 3rd Party Reimbursement for Medicare, Medicaid, Private Insurance, etc.)
* 946-45-Employee Benefit Funds
* 953-27-Claims Processing Services
* 953-52-Insurance and Insurance Services (Not otherwise classified)
* 953-80-Retirement Benefit Plan Insurance

Submit any questions or concerns regarding this solicitation to the Solicitation Coordinator shown above.