



Request for Proposals (RFP) # 2018-10

School Health Transactional System

Release Date:

July 24, 2018

Bidders' Conference:

August 6, 2018, 3:30-5 p.m. EST

Final Application Deadline:

August 21, 2018 by 6 p.m. EST



SECTION I: FUNDING OPPORTUNITY INTRODUCTION

A. The Children's Trust

The Children's Trust is a dedicated source of revenue established by voter referendum to improve the lives of children and families in Miami-Dade County. Additional information about The Children's Trust can be found at www.thechildrenstrust.org.

Vision: The Children's Trust envisions a community that works together to provide the essential foundations to enable children to achieve their full potential.

Mission: The Children's Trust partners with the community to plan, advocate for, and fund strategic investments that improve the lives of all children and families in Miami-Dade County.

The Children's Trust strategic plan and its annual budget serve to accomplish its mission and vision to direct investments that achieve results for the children and families of Miami-Dade County, and also improve the communities in which they live. It is grounded in four essential foundations for healthy child development:

- Social foundations foster healthy relationships in the lives of children;
- Educational foundations promote high-quality learning environments and health literacy;
- Economic foundations encourage prosperity and financial stability for all members of the community; and
- Environmental foundations promote healthy environments and supportive services.

No single program or organization can secure these foundations on their own and it is expected that recipients of funding will work together to pursue the necessary services and supports to achieve these foundations for children. Applicants are strongly encouraged to review the current strategic plan available at www.thechildrenstrust.org/content/how-we-fund.

B. Notice of Competitive Solicitation

The Children's Trust invites qualified vendors to submit proposals to develop, deploy, host, maintain and provide support for an electronic school-based health system and database. The Children's Trust has opened this contract for bid to ensure we get the best technology available for the school-based services. The existing contract will expire on June 30, 2019. This Request for Proposal (RFP) includes a nine-month overlap with the existing contract period to allow for sufficient development time should we need to transition to a new vendor.

C. Eligible Applicants

The successful applicant must be able to deliver the resulting solution as a service, including hosting, support, maintenance, and management of the solution on secure public cloud infrastructure or on the applicant's own private cloud infrastructure. Prospective applicants with a proven track record of successfully providing software as a service and managed services to nonprofit organizations serving children and families, foundations, educational



institutions, health care providers, government agencies or other public-sector clients are preferred. Applicants should be currently qualified to conduct business in the state of Florida under the laws of Florida per Chapter 607, F.S., and must be qualified to conduct business on or before the contract start date. The successful applicant must remain qualified to conduct business in the state of Florida for the duration of their contract. Applicants must be comprised of teams based entirely in the United States; teams based within the Eastern Standard Time zone are preferred. No applicant may apply to this RFP directly or indirectly through any agent, affiliate or other individual or entity. Any such application will be considered noncompliant with this solicitation and deemed ineligible whenever such determination is made during the procurement processes. The vendor submitting the application must be the entity that intends to provide service(s); however, the proposal may include disclosed subcontracted agreements. If the eligible vendor is a subsidiary of another entity, the relationship must be disclosed.

The Children's Trust is by statute (Section 125.901(2)(a)(3)) required to allocate and provide funds for other agencies in the county which are operated for the benefit of children, provided they are not under the exclusive jurisdiction of the public-school system. Miami-Dade County Public Schools, as well as applicants that operate a charter school are ineligible for funding.

D. Service Dates

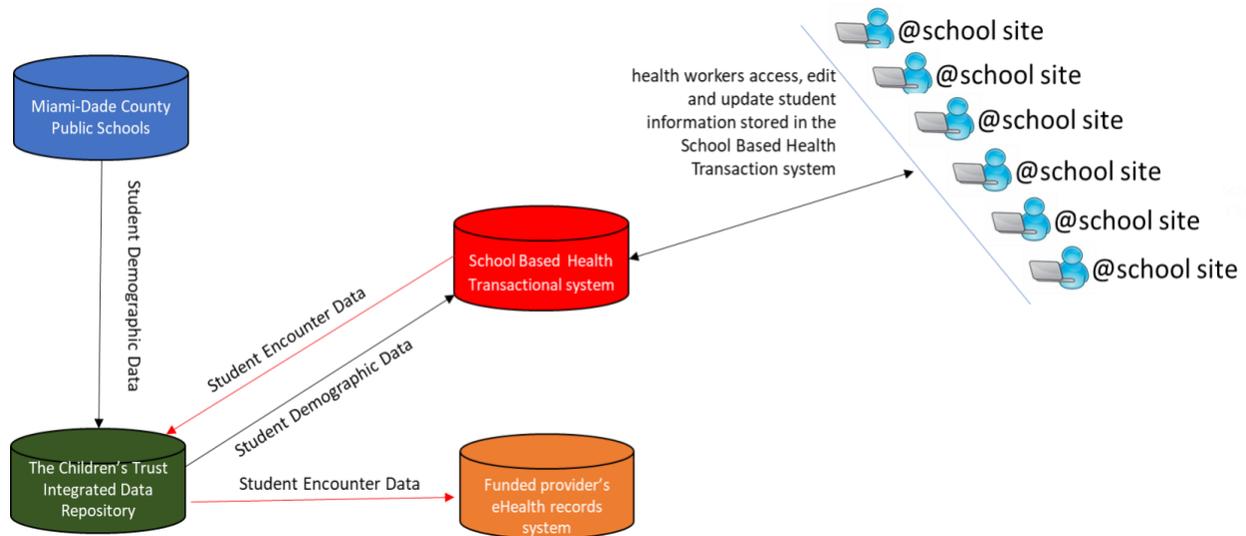
The anticipated start date for services proposed through this RFP is October 1, 2018. As per our procurement policy, the initial contract will be for a period of three years with the option of renewal for two additional years based on acceptable performance and IT solutions available at that time. At the end of a five-year period, the solution will be re-solicited.

E. Cone of Silence

The Cone of Silence is designed to protect the integrity of the procurement process by shielding it from undue influences prior to issuing a recommendation for contract awards. The Cone of Silence shall begin at the time of advertisement of the competitive solicitation and shall end when the Chief Executive Officer makes his or her written recommendation to the board. However, if The Trust board refers the recommendation back to the Chief Executive Officer for further review, the Cone of Silence is re-imposed until such time as the Chief Executive Officer makes a subsequent written recommendation. For additional information regarding Cone of Silence and other legal requirements, please go to www.thechildrenstrust.org/content/legal-requirements

SECTION II: PROFESSIONAL SERVICES DESCRIPTION

A. School Health Data Flow



This diagram shows the data flow and relationship between multiple parties involved in gathering, tracking, storing and reporting on The Children's Trust school-based health encounters. The student information is provided in a nightly feed from the Miami-Dade County Public School and stored in The Children's Trust Integrated Data Repository (IDR). The data is sent from IDR to school-based health transactional system in a nightly feed. The timing of the feed is such that the school-based health transactional system has student records from the prior school day. The school-based health providers will use the school-based health transactional system to record encounters. These encounters will be sent to the IDR on a nightly basis for long term storage and data analysis.

B. Functional Software Specifications

The Children's Trust requires all Trust-funded school-based health providers to report on services delivered to facilitate quality of care and tracking of impact. The vendor will develop, deploy, host, maintain and provide support for a school-based health system transactional system. The vendor will provide software hosting, product development to meet The Children's Trust's contract requirements, help desk support, and training as requested by The Children's Trust and the contracted end users. The system should be able to support no less than 300 end users distributed across 141 school-based health clinic sites, however, actual number of end users will be determined by vendor's pricing structure. Encounters to be traced include clinic visits, screenings, health education and chronic disease management.



The proposed software solution must meet the following key requirements:

- Must be HIPAA (Health Insurance Portability and Accountability Act) and FERPA (Family Educational Rights and Privacy Act) compliant;
- Must have the ability to automate billing for Medicaid and/or private insurance;
- Must have the ability to ETL (extract, transform and load) a daily feed of the Miami-Dade County Public School (M-DCPS) student records via web service from the IDR;
- Must have the ability to ETL a daily feed of student encounter records to The Children's Trust IDR via web service;
- Must house all data on servers located in the continental United States;
- Must have a user-friendly interface accessible from mobile devices;
- Must have a user-friendly interface to facilitate the submission of electronic consent forms and viewable access to child's encounters;
- Must have the ability to track various service codes required by state school health mandates;
- Must have the ability for a Children's Trust administrator to update the service codes as needed;
- Must have the ability to create and maintain individual health plans for students with special health care needs;
- Must have the ability to easily identify and track students with special health care needs, including life-threatening allergies;
- Must have the ability for users to easily document various aspects of student encounters, including but not limited to: safe medication administration, medical services, behavioral health services, vision referrals and community-based medical referrals;
- Must return data to the IDR in a format that allows for reporting on the following items:
 - State statutory reporting on delivery of mandatory school-based health services
 - Highlighting students who are frequent users of the services;
 - Highlighting students with chronic conditions such as diabetes, asthma and seizures;
 - Easily track students with chronic absenteeism (including both excused and unexcused absences);
 - Provide accurate information on the student return-to-class rate;
 - Provide follow-up tracking and disposition of community service referrals made; and
 - Utilization of services by school, school year, and other variables.

Functional software requirement specifications include drop-down selection capability for users to enter student encounters such as Clinic Visits, Non-Visit Activities, Screenings, Health Education, Chronic Disease Management. See Attachment A for a detail list of each category listed below:

- Visit type
- Source of Referral
- Reason for Visit
- Referred to (needs to allow for multiple, as well as have follow up tracking/reminders)
- Interventions
- Activities
- Outcome Disposition
- Injury Classification for First Aid

- Injury Location for First Aid
- Primary Psychosocial Problem
- Chronic Conditions
- Child Specific Training
- Health Education Topic
- Health Education options
- Body Mass Index (BMI) Screenings
- Vision Screenings
- Oral Health Screenings

C. Related Attachments

1. Required Data Fields:
<https://app.box.com/s/miytf7avx34jl05fbr0jp2c687txk2z>
2. Daily Feed from M-DCPS:
<https://app.box.com/s/nfnch81cmy2ox1x99zppoffo77250te9>
3. Samples of Reports:
<https://app.box.com/s/uk7k0mb3o22pbxtp0x95ef2uvwn98b1j>
4. IT core contract:
<https://app.box.com/s/23fybxjs4pejstv3n568thbnwgysc9zq>

Data Flow and Functional Software Specifications (800WL)

- 1.** Discuss your understanding of the School Health Data Flow from the diagram above

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Data Flow and Functional Software Specifications (800WL)

- 2.** Demonstrate your understanding of this RFP by providing a brief overview of the scope of the engagement and the ability to meet the requirements.

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D. Project Implementation

The Children's Trust will work in partnership with the selected vendor. The Children's Trust's role includes: providing requirements, refining requirements, participating in UAT, and providing approval and sign-off for development features and functionality. The selected vendor will use its expertise to provide and recommend best practice solutions. The vendor will define: implementation roadmap and timing, development methodology, deliverables, business design decisions, business process design approach, data integration approach, testing approach, change management approach, project management, team structure and/or other relevant information.

Project Implementation (500WL)

Discuss your methodology and approach to successfully implement the project. Response content should include your organization's approach to but not limited to the following: implementation roadmap and timing, development methodology, deliverables, business design decisions, business process design approach, data integration approach, testing approach, change management approach, project management, team structure and/or other relevant information.

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E. Related Market Footprint

We expect applicant to have a proven track record of success implementing school health software as a service solution. Experience includes helping customers achieve economies of scale and business efficiencies.

Related Market Footprint (500WL)

1. Discuss your market footprint in the school-based health service arena.

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Related Market Footprint (500WL)

2. Discuss the presence of customers using your software with specifications similar to this RFP.

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F. Organizational Capacity

Applicants are expected to have an established record implementing electronic health records solution to school-based health programs based on a software as a service solution using an agile methodology. Qualified human resources and vendor staffing continuity throughout development and deployment are expected to ensure a successful engagement.

Organizational Capacity (500WL)

1. Discuss the applicant's ability to provide qualified human resources and staffing to successfully implement the project. Response content should demonstrate team expertise in related engagements and include staffing roles with specific related expertise.

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Organizational Capacity (500WL)

2. Discuss the applicant's organizational experience and capability with regards to the work defined. Response content should include prior engagements and implementations providing software as a service and managed services to nonprofit organizations serving children and families, foundations, educational institutions, health care providers, government agencies or other public-sector clients.

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Organizational Capacity (500WL)

3. Discuss what uniquely qualifies your organization to support the work described in this RFP.

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G. Pricing Scheme

We expect competitive pricing for nonprofit organizations, foundations, educational institutions, health care providers, government agencies or other public-sector clients is expected.

Pricing Scheme (300WL)
1. Discuss your pricing approaches
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Pricing Scheme (300WL)
2. Discuss your basic services, optional services, one-time cost, and recurring costs.
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SECTION III: APPLICATION EVALUATION CRITERIA

A. Application Reviews

The review process is designed to select the most qualified vendors in an open and fair manner. Applicants must meet the eligibility criteria outlined above in order to be considered for this RFP. Each application will be independently reviewed and scored by a team of reviewers that may include Trust staff, experts in the field and trained volunteers. A 100-point scale will be used to rate applications. The table below summarizes the evaluation criteria, RFP questions and related points.

Criteria	Questions – Maximum 10 points each	Maximum Points
Demonstrated Level of Technical Functionalities and Project Implementation	<ol style="list-style-type: none"> 1. Discuss your understanding of the School Health Data Flow from the diagram above. 2. Demonstrate your understanding of this RFP by providing a brief overview of the scope of the engagement and the ability to meet the requirements. 3. Discuss your methodology and approach to successfully implement the project. Response content should include: implementation roadmap and timing, development methodology, deliverables, business design decisions, business process design approach, data integration approach, testing approach, change management approach, project management, team structure and/or other relevant information. 	30
Related Market Footprint	<ol style="list-style-type: none"> 1. Discuss your market footprint in the school-based health service arena; 2. Discuss the presence of customers using your software with specifications similar to this RFP. 	20
Organizational Capacity	<ol style="list-style-type: none"> 1. Discuss the applicant’s ability to provide qualified human resources and staffing to successfully implement the project. Response content should demonstrate team expertise in related engagements and include staffing roles with specific related expertise. 2. Discuss the applicant’s organizational experience and capability with regards to the work defined. Response content should include prior engagements and implementations providing software as a service and managed services to nonprofit organizations serving children and families, foundations, educational institutions, health care providers, government agencies or other public-sector clients. 3. Discuss what uniquely qualifies your organization to support the work described in this RFP. 	30
Pricing Scheme	<ol style="list-style-type: none"> 3. Discuss your pricing approaches 4. Discuss your basic services, optional services, one-time cost, and recurring costs. 	20

B. Rating Scale

Using the rating scale below, reviewers assess the quality of responses within each section, the alignment with solicitation requirements, and the applicant's capacity to effectively implement the software solution.

Rating	Points	Description
Excellent Response	9-10	<ul style="list-style-type: none"> ✓ Response is fully complete and relevant for the section. ✓ Response provides evidence that the applicant exceeds the requirement(s) for the section as set forth in the RFP
Good Response	6-8	<ul style="list-style-type: none"> ✓ Response is mainly complete and relevant for the section but may require some additional clarification. ✓ Response provides evidence that the applicant meets the requirement(s) for the section as set forth in the RFP.
Weak or Incomplete Response	3-5	<ul style="list-style-type: none"> ✓ Response is incomplete for the section—required information is missing and/or the response has major omissions. ✓ Response does not provide evidence that the applicant meets the minimum requirement(s) for the section as set forth in the RFP.
Unacceptable Response	1-2	<ul style="list-style-type: none"> ✓ Response is substantially incomplete, unresponsive and/or not relevant for the section. ✓ Response presents a major problem or counter-productive strategies in meeting the RFP requirement(s)

C. Interviews and Software Demonstration

Publicly-noticed interviews will be conducted regarding the proposed solution, including a demonstration of the software. The demonstration of the proposed software system must be conducted using the specific product and version included in the applicant's response and should demonstrate the requirements outlined in this RFP. If the proposal is to develop a custom system, then the demo should include design documentation and data module to support the solution.

D. Board review and approval:

President/CEO recommendations are reviewed and considered by the board at publicly-noticed committee meetings and board meetings. Applicants are encouraged to attend these meetings. Board approval of the recommendations will allow the contract negotiation process to begin. Negotiation may include reframing the proposed scope of work, and adjusting the total allocation, budget or any other changes necessary to comply with the requirements of the solicitation and resulting contract. All the contract terms included in the grant opportunity are non-negotiable.



SECTION IV: APPLICATION TIMETABLE AND INSTRUCTIONS ON SUBMISSION OF RESPONSES

A. Application Timetable

EVENT	DATE/DUE DATE
Release of RFP and Cone of Silence goes into effect	July 24, 2018
Bidders' Conference Webinar. Call in phone # 800.503.2899; access: 0908104#	August 6, 2018, @ 3:30-5 p.m.
Last day to submit written questions/inquiries using this email: schoolhealth@thechildrenstrust.org and include "RFP # 2018-10" in the subject line.	August 10, 2018
Final publication on The Children's Trust website of responses to questions/inquiries and any final RFP addenda https://www.thechildrenstrust.org/content/procurement	August 14, 2018
Application Submission Deadline to: https://www.thechildrenstrust.org/content/procurement	August 21, 2018, no later than 6 p.m. Eastern time
Application Review Period	August 21-23, 2018
Debriefing Meetings, Interviews, and Demonstrations	August 24, 2018
Notification Letters sent to applicants – Cone of Silence lifted	August 27, 2018
Recommendation made to Finance and Operations Committee	August 30, 2018
Appeal review meetings, as needed	August 31st, 2018
Board of Directors meeting to approve Finance and Operations Committee recommendation	September 4, 2018
Contract negotiation begins	September 5, 2018
Contract Starts	October 1, 2018

B. Instructions on Submission of Responses

To be considered, responses must be received by the date and time listed on the Application Timetable above, using the required format provided herein. Submissions that do not follow the instructions described in this RFP will not be accepted. Each applicant must complete the application form (<https://www.thechildrenstrust.org/content/procurement>) and include any attachments within the form.