

Massachusetts League of Community Health Centers

Request for Proposals (RFP)

The logo features a thick, lime-green arch that curves over the text. The text is in a blue serif font, with "Massachusetts League" in a larger size and "of Community Health Centers" in a smaller, italicized size below it.

Massachusetts League
of Community Health Centers

Solicitation for: End-to-End Loan Repayment Software Solution

Submission of Proposals Due Date:

May 14, 2024

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Request for Proposal (RFP) – Key Elements

1. Introduction

This Request for Proposal (RFP) invites prospective software solution Vendors to propose an end-to-end student loan repayment software solution for The Massachusetts League of Community Health Centers, Inc. (MLCHC). This software will facilitate MLCHC's student loan repayment programs, which are integral to supporting health and human service professionals. With a budget exceeding \$315 million, these initiatives offer student loan repayment to individuals who commit to working in eligible provider settings for a predetermined Service Obligation. In November 2022, MLCHC signed a ten-year contract with the Massachusetts Executive Office of Health and Human Services (EOHHS) to administer these programs on behalf of EOHHS.

2. Contact Information

Please direct all communications about this RFP to Giselle Saravia.

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3. Overview

MLCHC is seeking a software solution Vendor to provide an end-to-end student loan repayment software solution described in the Scope of Services Section (Section 6) below beginning in August of 2024. The contract will initially be for a duration of 2-3 years, with the possibility of renewal upon mutual agreement.

3.1 Definitions

Applicant – An individual who applies for student loan repayment for outstanding educational debt.

Awardee – An individual that applies for student loan repayment for outstanding educational debt and is selected to receive a loan repayment award; provided that the individual either accepts or denies the award.

Awardee Agreement – The contract executed between the Awardee and the MLCHC which outlines the terms of the program and recoupment, details the Awardee's responsibilities and obligations, and details the contractor's responsibilities and obligations.

Behavioral Health Clinicians – Any behavioral health provider employed by an eligible community-based organization who has been awarded a qualifying degree. This includes, but is not limited to psychiatrists, nurse practitioners (NPs), psychologists, social workers, licensed mental health counselors (LMHCs), and other master's and bachelor's prepared mental health providers.

Bidder – Entity that submits a response to the request for proposal (RFP).

Constant Contact – A marketing platform specializing in email marketing services, offering tools for businesses to create, manage, and analyze their email campaigns.

Disbursement – A payment or transfer of funds from the MLCHC to the participant's Loan Servicer to reduce the participant's student loan balance.

Executive Office of Health and Human Services (EOHHS) – Secretariat that oversees 12 state agencies and two Soldier's Homes and is the single state agency responsible for the administration of the Medicaid program and the State Children's Health Insurance Program within Massachusetts (collectively, MassHealth)

and other health and human services programs designed to pay for medical services for eligible individuals pursuant to M.G.L. c. 118E, Title XIX of the Social Security Act (42 U.S.C. sec. 1396 et seq.), Title XXI of the Social Security Act (42 U.S.C. sec. 1397aa et seq.), and other applicable laws and waivers.

Eligible Organization – An employer setting that is deemed eligible by EOHHS for a particular program or Task Order.

Loan Repayment Funds Payment – A defined payment amount provided by EOHHS to the MLCHC to support payments to student Loan Servicers on behalf of Awardees, within an agreed-upon payment schedule and the terms of the Awardee Agreement.

Loan Servicer – The organization/entity that manages student loan accounts for borrowers. Student loan borrowers make payments directly to their Loan Servicer. The Loan Servicer manages all aspects of loan repayment and customer service related to the student loan and is the entity that a student loan borrower interacts with once they are in repayment. The servicer acts on behalf of the lender (which in some cases is the US Dept of Education).

MA Repay Program – A government-funded program administered by the Massachusetts League of Community Health Centers on behalf of the Massachusetts Executive Office of Health and Human Services encompassing several sub-programs otherwise known as Task Orders, designed to help healthcare providers repay their educational loans.

MassHealth – MassHealth is the single state agency responsible for administering the State's Medicaid program and the State's Children's Health Insurance Program (collectively, MassHealth). MassHealth serves more than 1.8 million low- and moderate-income individuals and families and aims to provide access to high-quality, integrated healthcare.

MassHealth Member – An individual who receives health insurance coverage through Massachusetts Medicaid and CHIP.

Master Agreement – The contract that outlines the terms, conditions, and general provisions governing the relationship between EOHHS and MLCHC.

MLCHC – Massachusetts League of Community Health Centers.

National Provider Identifier (NPI) – A unique 10-digit identification number for covered health care providers.

Outstanding Educational Debt – Qualifying educational loans are government and commercial loans for actual educational costs associated with the course of study that led to the highest degree earned as a prerequisite to obtaining the relevant clinical credential. Applicants must provide a copy of all qualifying loan documentation (e.g., promissory notes) to MLCHC, the Contractor, in the manner prescribed by the Contractor. Government loans are loans that are made by federal, state, county or city agencies that are authorized by law to make such loans. Commercial loans are defined as loans made by banks, credit unions, savings and loan associations, insurance companies, schools, and other financial or credit institutions that are subject to examination and supervision in their capacity as lenders by an agency of the United States or of the State in which the lender has its place of business.

The following educational loans are NOT eligible for repayment:

- Loans that were consolidated with any other type of debt (non-educational) or another person's debt;
- [HRSA Primary Care Loans](#) (e.g., National Health Service Corp Loan Repayment);
- [Parent Plus loans](#);
- Loans from a family member or friend;
- Personal lines of credit;
- Loans not obtained from a government entity or commercial lending institution;
- Loans that are in default or collections;
- Loans that have been repaid in full; and
- Loans for which the associated documentation does not identify the loan as applicable to undergraduate or graduate education.

Panel – A group of patients who are served by a single provider, Personal Practice, or organization.

Participant – An individual who applies for loan repayment for outstanding educational debt and is selected to receive a loan repayment; provided that, the individual was awarded and has accepted per the terms of the Awardee Agreement.

Personal Practice – An individual practitioner (doctor of medicine, doctor of osteopathic medicine, or nurse practitioner) who provides mental and behavioral health services but is not affiliated with a behavioral health or medical organization.

Power BI – A business analytics tool developed by Microsoft, designed to provide interactive visualizations and business intelligence capabilities.

Provider ID and Service Location (PID/SL) – MassHealth provider ID and service location (PID/SL) are associated with each provider's National Provider Identifier (NPI) in MassHealth's Medicaid Management System (MMIS). A PID/SL is 10 characters long, made up of a 9-digit base number and an alpha service location (e.g. 1234567 89A). The provider's PID/SL is displayed on MassHealth reports as well as correspondence and remittance advice.

Response – Any information submitted by the Bidder in response to the requirements outlined in the RFP, including any clarifying information requested by MLCHC. Within the RFP, the term "Quote" is used interchangeably with "Response".

Request for Proposal (RFP) – Outlines the requirements, specifications, and expectations of the project, inviting interested parties to submit detailed proposals outlining their approach, qualifications, pricing, and other pertinent information.

Service Obligation – As a condition of receiving the loan repayment award, Awardees must agree to provide direct care in an eligible role and approved organization for a period outlined in the contract with the MLCHC.

Sub-Program – A student loan repayment program within MA Repay with its own eligibility requirements and criteria.

Task Order – Agreements entered between EOHHHS and the MLCHC to implement MA Repay Sub-Programs for outstanding educational debt pursuant to the Master Agreement.

Vendor – The Bidder who is awarded and executes a contract or agreement under this RFP.

Vendor Memorandum of Agreement – A legal contract between a Vendor and the MLCHC that outlines the terms and conditions governing the sale and purchase of services and scope of work. Its purpose is to establish clear expectations and responsibilities for both parties involved in the business relationship.

Visual Vault – A cloud-native content platform upon which you can quickly build line-of-business solutions with low-code and no-code apps and existing templates.

4. MLCHC Description

The Massachusetts League of Community Health Centers (MLCHC) is a Massachusetts nonprofit corporation and primary care association (PCA) authorized under the Public Health Services Act, serving as the PCA for all Massachusetts community health centers. The MLCHC was founded in 1972 as one of the first state Primary Care Associations (PCAs) in the country. Established under the same federal authorizing legislation as the health center program (Section 330 of the Public Health Service Act), PCAs are organized around a set of core functions and competencies that provide a framework for support and assistance to health centers and the communities they serve. As such, the League is a non-profit 501(c)(3) organization registered as a public charity with the Commonwealth's Secretary of State and maintains a professional staff at its headquarters in Boston and its training center in Worcester.

MLCHC has extensive experience administering comprehensive student loan repayment programs for safety net providers throughout the Commonwealth. Over the past 15 years, MLCHC has been the partner of choice for different entities seeking to design and implement loan repayment programs, starting with the Bank of America-funded programs in the 2000s, Massachusetts Department of Public Health programs over the past decade, and more recently the Statewide Investments programs for primary care and behavioral health providers funded through MassHealth under the Delivery System Reform Incentive Payment (DSRIP) program.

Most recently, MLCHC has contracted with the Executive Office of Health and Human Services (EOHHS) for the planning and implementation of the MA Repay Program. This student loan repayment program is composed of various Sub-Programs that provide funding for primary care, behavioral health, home health and human service providers. The MLCHC team has worked and will continue to work collaboratively with funders and community-based stakeholders to meet the specific goals of the MA Repay Program, including supporting the recruitment and retention of high-quality providers and staff to serve the communities and residents of the Commonwealth.

MLCHC's approach to administering loan repayment programs reflects our values as an organization to improve support for the communities MLCHC serves and that our health center members serve. MLCHC prioritizes delivering a responsive, equitable, fair, and accountable process to our funders and Applicants across all activities, leveraging technology where possible to bring programs to scale. Our processes enable:

- **Application design and implementation:** MLCHC works collaboratively with our community-based stakeholders including health center leadership, behavioral health trade organizations, consumer groups, past Awardees, and our funders to design an application that is accessible to Applicants, yields interest from diverse and under-represented populations, and asks appropriate questions aligned with the priorities of the MA Repay Program. MLCHC has established software that uses modern security measures to ensure that information is secure and accurate before review.
- **Review of applications:** MLCHC conducts a thorough review of all applications to ensure that Awardees are eligible and demonstrate the values and commitment to service in the Commonwealth

that underscore these programs. Our review process, including involving multiple reviewers and standardized criteria, leverages the knowledge of local partners and has internal controls established to ensure that the distribution of awards is equitable and reflects the priorities of the Commonwealth.

- **Distribution of funding and internal controls:** Over the past 15 years, MLCHC has developed a process for validating eligibility of Awardees before Disbursements and managing tax-free Disbursements in a systematic manner aligned with Awardee preferences and IRS regulations. Over the past five years, MLCHC has made over **800 Disbursements to Loan Servicers, totaling more than \$16 million in student loan repayment** for Massachusetts medical and behavioral health providers.

MLCHC is a solid partner for the administration of loan repayment programs in the Commonwealth. Due to the size and scale of the current and future Task Orders, there is a critical need for an enhanced technology infrastructure.

5. Current Needs Applicable to Project

MLCHC is seeking an end-to-end student loan repayment software solution to support the administration of a rapidly growing student loan repayment program portfolio. MLCHC administers multiple student loan repayment programs for healthcare and human services providers in Massachusetts on behalf of the Executive Office for Health and Human Services (EOHHS).

Currently, the program's operational management utilizes spreadsheets and internally developed application trackers. In addition, the MA Repay loan repayment program is supported by a 3rd party call center. As the loan repayment programs continue to grow, MLCHC is seeking a software solution to support multiple loan repayment programs at scale from an operational, financial, and analytical perspective. These requirements are discussed in more detail within the Scope of Services Section below (Section 6). Operationally, this includes an ability for MLCHC staff to support all steps of the program cycle (application, application review, award notifications, employment and loan verification, Disbursements, contract management, and award recoupment) for all current and future loan repayment programs.

Financially, functionality is needed to ensure awards can be disbursed at scale by being able to issue checks and/or transfer funds electronically to Loan Servicers on behalf of loan repayment program Participants. The solution must also support the process for award recoupment plus interest if program Participants breach their Service Obligations outlined in their Awardee Agreement.

6. Scope of Services

6.1 Objectives

This project aims to procure and implement a comprehensive software solution for the end-to-end management of MLCHC's student loan repayment programs. This solution aims to optimize the collection and tracking of Applicant data, ensuring accuracy and efficiency. Additionally, the software will enable streamlined application review and management processes by the MLCHC team. The software will also facilitate contract management, including sending of Awardee Agreements to Awardees and supporting signing such contracts by Awardees and MLCHC. Furthermore, the software solution will facilitate award Disbursement to student Loan Servicers, while providing functionality for managing recoupment in the event of contract breaches. The software solution must also integrate real-time with existing systems, such as Visual Vault, Constant Contact, and Power BI while prioritizing and enhancing the overall efficiency and effectiveness of MLCHC's loan repayment programs.

6.2 Requirements

Application and Registration Form

The software solution must be equipped to facilitate a comprehensive registration and application process for current and future Task Orders, each with separate requirements. It must enable the collection of diverse Applicant data, including demographic details like multiple email addresses and phone numbers, as well as information on addresses, languages spoken, ethnicity, race, sexual orientation, gender identity, and date of birth. The software must be able to accept a diverse set of document types from Applicants for example: PDFs, PNGs, JPGs, Word documents, etc. Any forms must be fully compatible with mobile devices, featuring a responsive design to accommodate Applicants accessing the application process from various devices.

The software solution must support the management of Applicant organization/employer data, allowing for the tracking of changes and multiple employer affiliations. It must also handle employment-related data such as organization addresses, types, job roles, employment statuses (full-time or part-time), weekly working hours, and professional specialties or fields.

The software solution must manage professional data like multiple degree types, license information, active license indicators, and income/salary details. It must capture application-specific information such as reasons for withdrawal, current debt, Paid Family and Medical Leave (PFML) details, past PFML employment verification, communication preferences (text, email), and referral sources. It must also possess the capability to generate and send PDF application printouts via confirmation emails. It must be able to store all communications with Applicants and Awardees.

The software solution must integrate with Adobe E-sign to facilitate document signing, ensuring a smooth and efficient process for Applicants. The forms must offer branding capabilities, allowing customization of fonts, color schemes, logos, and other visual elements to maintain consistency with the MLCHC's branding guidelines. The solution must support multiple versions of forms to reflect different languages spoken by a diverse Applicant pool. Translation will be conducted by translators hired by MLCHC for the most common languages such as Spanish, French, Haitian Creole, and Portuguese. For less common languages, an automated translation service provided by the Bidder will be utilized.

Applicant Review and Management Functionality

The software solution must provide configurable robust support for the application review process conducted by the MLCHC team. This entails functionalities such as the ability to manage applications and Applicants efficiently throughout the application review stage to allow the MLCHC team to determine which Applicants are eligible for awards. The software solution must incorporate a flexible and user-friendly interface to ensure ease of navigation and interaction for the MLCHC team. The software solution needs to include the ability to create tasks for MLCHC users, allowing them to efficiently assign and track specific actions related to application review and management. Furthermore, it should offer notification functionalities to alert users of task assignments, deadlines, and updates, ensuring timely and organized execution of tasks throughout the application review process.

The software solution must provide robust search capabilities that allow the MLCHC team to search and filter Applicant data across various parameters such as Applicant name, application submission date, application status, etc. It must also allow for the seamless movement of Applicants between different program segments based on their eligibility criteria, including employer and role considerations.

The software solution must feature a real-time filtering mechanism allowing the MLCHC team to categorize Applicants, Awardees, and Participants into different statuses corresponding to their current stage in the

application process. These statuses must include but not be limited to: "Applicant Registered," indicating that the Applicant has initiated the process by registering; "Application In Progress," denoting that the Applicant is actively working on their application; "Application Submitted," signifying that the Applicant has completed and submitted their application; "Application Incomplete," indicating that the application is missing required information or documents; and "Application Withdrawn," suggesting that the Applicant has voluntarily withdrawn their application. Similarly, the software must track Awardees and Participants through various stages, allowing for efficient management and monitoring of their progress within the program. The software solution must be able to flag and resolve possible duplicate applications.

The software solution must display comprehensive student loan repayment program details for Participants, including application status, number, Applicant ID, program details, award status and amount, Disbursement dates, Awardee Agreement details, Service Obligation terms, funding sources, and reviewer information. The software solution must enable the tracking of whether an Applicant is an active Participant in other loan repayment programs, indicating their Service Obligations, and allow the MLCHC team to move Applicants between different program segments based on eligibility. The software solution must log all changes made to Applicant statuses or application details, and it should grant MLCHC staff the ability to make modifications to submitted applications or upload documents if necessary.

In addition, the software solution must have the ability to seamlessly import data from existing programs into the centralized database of the new system. This entails an initial ingestion of data sourced from Excel files and relational databases.

Case Management Functionality

The software solution must include comprehensive functionality to manage interactions with Applicants effectively. The software solution must capture extensive data during contact with Applicants, such as case number, status, assigned staff, resolution date, and notes, to facilitate efficient case management and follow-up. It must enable seamless communication with Applicants through various channels, including targeted emails, SMS/text messages, and chat, allowing for personalized outreach and engagement. It must collect relevant data during interactions, including the date of interaction, communication channel, subject/reason for contact, and any additional notes, with the ability to designate cases as escalated for prioritized attention and resolution. The software solution must support the creation and maintenance of email and SMS/text message templates to streamline communication processes.

Award Disbursement and Annual Verification Functionality

The software solution must offer comprehensive functionality for managing payments and Disbursements to student Loan Servicers efficiently and at scale. This includes facilitating the processing of various awards and Disbursements to ensure timely and accurate payments. The software solution must capture essential data elements related to awards and Disbursements, such as award amount, Disbursement status, Disbursement dates, and student loan information, to maintain detailed records and track financial transactions effectively. Additionally, the software solution must support the management of recoupment for Awardee Agreement breaches, providing detailed calculators, repayment plans, and waiver request tracking features. This functionality must include tools to calculate, track, and monitor the amount owed and balances paid to MLCHC, including interest, and manage repayment plans and waivers. The software solution must enable users to document Awardee contract status, including any rescinded contracts and associated reasons, to ensure transparency and compliance with contractual obligations.

The software solution must possess the capability to efficiently send, manage and store annual contracts with Awardees, encompassing various documents such as employment and loan verifications. Integration with Adobe E-sign or an equivalent platform should be implemented, to facilitate Awardee's smooth completion of the annual verification process.

Analytics and Dashboards

The software solution must offer robust reporting and analytics capabilities to enable MLCHC users to generate customized reports and dashboards tailored to their specific needs. This functionality must allow for the creation of reports and dashboards that can be exported and downloaded in multiple file formats for easy sharing and analysis. Additionally, the software solution must support both pre-defined reports and customizable reports, giving users the flexibility to generate insights based on their unique requirements. MLCHC users must have access to summary and detailed views of reports and dashboards, with different graphical and display options available for enhanced visualization and analysis.

In addition, the software solution must support reporting on various stages of the application process, such as accounts created and submitted applications, to monitor progress and identify areas for improvement. It must include email campaign reporting features to track metrics such as open rates and bounced rates, providing valuable insights into the effectiveness of communication efforts.

Implementation Engineer Services

The Bidder must provide comprehensive software implementation services. These services should encompass the deployment, configuration, and optimization of the software to meet the MLCHC's specific requirements. The Bidder must supply highly skilled software engineers with expertise in system configuration, customization, and integration. These engineers must be capable of translating functional specifications into technical solutions, configuring the software solution to align with the MLCHC's workflow, and integrating it seamlessly with existing systems.

Project Management Services

The Bidder must offer project management services to oversee the successful implementation and maintenance of the software solution. This includes providing detailed plans outlining implementation phases and timelines, and ensuring that all project milestones are met efficiently. The Bidder must also offer dedicated support during both the onboarding phase and post-launch to address any issues promptly and ensure smooth operation. Additionally, end-user training support must be provided to ensure that all stakeholders are proficient in using the software effectively. Furthermore, the Bidder must actively manage the project, coordinating tasks and resources to ensure timely delivery and successful outcomes. Effective communication channels must be established to facilitate collaboration and transparency throughout the project lifecycle.

Documentation

The selected Vendor will be required to deliver detailed documentation, including the following:

- **Project Organization and Kickoff Plans:** Detailed plans outlining the organization of the project team and the kickoff process to initiate project activities effectively.
- **Requirements Definition and Documentation:** Comprehensive documentation of all functional and technical requirements gathered through thorough elicitation and review processes.
- **Configuration and Custom Development Plans:** Strategies for configuring the software solution to meet specific requirements and any plans for custom development of additional features or functionalities.

- **Knowledge Transfer:** Plans for transferring knowledge to end users and administrators.
- **Data Migration and Conversion Outlines:** Detailed plans for migrating and converting data from existing systems to the new software solution, ensuring data integrity and accuracy.
- **End-User Training Materials:** Development of training materials and resources for end users to effectively utilize the software solution.
- **Deployment and Go-Live Support Documentation:** Documentation outlining the deployment process and providing support during the transition to the new software, ensuring a smooth go-live experience.
- **Solution Change Management Post-Go-Live:** Strategies and procedures for managing changes to the software solution after deployment, including version control and release management.
- **Testing Plans and Execution Protocols:** Comprehensive testing plans including test scenarios, test cases, test scripts, test data requirements, and protocols for test execution.
- **Final Acceptance Test Results and Certification:** Documentation of final acceptance test results and certification of the software solution's readiness for deployment.
- **Issue Tracking and Reporting Mechanisms:** Systems and procedures for tracking and reporting issues discovered during testing or post-go-live operations.
- **Performance, Stress, and Security Testing Plans and Results:** Detailed plans and results of performance, stress, and security testing to ensure the reliability, scalability, and security of the software solution.
- **Vulnerability Scans for Hosted Solutions:** Documentation of vulnerability scans conducted within the last year for proposed hosted solutions, ensuring compliance with security standards and regulations.

6.3 Privacy and Data Security Requirements

The Bidder must have sufficient physical and digital security measures in place to protect its premises and data centers and comply with EOHHS and MLCHC IT security standards, policies, and reporting requirements. This includes but is not limited to:

1. Agreeing to certain obligations regarding data privacy and security including those regarding the protection of personal information, as defined in M.G.L. c. 93H, and personal data, as defined in M.G.L. c. 66A, owned or controlled by EOHHS that the Vendor may access in connection with its performance under the Master Agreement. For purposes of complying with such obligations, Vendor should note that it is expected that the Vendor will have access to personal information and/or personal data in connection with its performance of the Task Order. Without limiting the generality of the foregoing, the Vendor agrees to comply with the following:

- a. The Vendor shall take all steps to ensure the security and confidentiality of all Commonwealth data for which the Vendor becomes a holder, either as part of performance or inadvertently during performance, with special attention to restricting access, use and disbursement of personal data and information under M.G.L. c. 93H and c. 66A and other applicable state and federal privacy requirements.
- b. The Vendor shall comply with M.G.L. c. 93I for the proper disposal of all paper and electronic media, backups or systems containing personal data and information.
- c. The Vendor shall ensure that any personal data or information transmitted electronically or through a portable device is properly encrypted using (at a minimum) the Commonwealth's "Cryptographic Management Standard" set forth in the Enterprise Information Security Policies and Standards published by the Executive Office for Technology, Services and Security (EOTSS), or a comparable Standard prescribed by EOHHS.
- d. The Vendor shall immediately notify MLCHC who shall notify EOHHS in the event of any security breach, including the unauthorized access, disbursement, use or disposal of personal data or information and, in the event of a security breach, the Vendor shall cooperate fully with MLCHC and EOHHS and provide access to any information necessary for MLCHC or EOHHS to respond to the security breach and shall be fully responsible for any damages associated with the Vendor's breach including, but not limited to, damages under M.G.L. c. 214, § 3B.
- e. Vendor certifies under the pains and penalties of perjury that it: (1) has read M.G.L. c. 93H and c. 66A and agrees to protect any and all personal information and personal data; and (2) has reviewed all of the Enterprise Information Security Policies and Standards published by the Executive Office for Technology, Services and Security (EOTSS), or stricter standards prescribed by EOHHS. Notwithstanding any contractual provision to the contrary, in connection with the Vendor's performance under the Task Order, the Vendor shall: (1) obtain a copy, review, and comply with any pertinent security guidelines, standards, and policies; (2) comply with the Enterprise Information Security Policies and Standards published by the Executive Office for Technology, Services and Security (EOTSS), or a comparable set of policies and standards ("Information Security Policy") as prescribed by EOHHS; (3) communicate and enforce such security guidelines, standards, policies and the applicable Information Security Policy among all employees (whether such employees are direct or contracted) and subcontractors; (4) implement and maintain any other reasonable appropriate

security procedures and practices necessary to protect personal information and data from the unauthorized access, destruction, use, modification, disclosure or loss; (5) be responsible for the full or partial breach of any of these terms by its employees (whether such employees are direct or contracted) or subcontractors during or after the term of the Task Order, and any breach of these terms may be regarded as a material breach of this Task Order; (6) in the event of any unauthorized access, destruction, use, modification, disclosure or loss of the personal information or personal data (collectively referred to as the “unauthorized use”): (a) immediately notify EOHHS if the Vendor becomes aware of the unauthorized use; (b) provide full cooperation and access to information necessary for EOHHS to determine the scope of the unauthorized use; and (c) provide full cooperation and access to information necessary for EOHHS and the Vendor to fulfill any notification requirements.

- f. Breach of these terms may be regarded as a material breach of the Task Order, such that EOHHS may exercise any and all contractual rights and remedies, including, without limitation, indemnification, withholding of payments, Task Order suspension, or termination, pursuant to the Commonwealth’s Terms and Conditions. In addition, the Vendor may be subject to applicable statutory or regulatory penalties, including, and without limitation, those imposed pursuant to M.G.L. c. 93H and under M.G.L. c. 214, § 3B for violations under M.G.L c. 66A
2. The Vendor shall also comply with all state and federal laws and regulations applicable to the privacy and security of personal and other confidential information, and any other legal obligations regarding the privacy and security of such information, to which the Vendor is subject.
 3. EOHHS reserves the right to add any requirement that it determines necessary or appropriate to include in order for EOHHS to comply with the applicable state and federal laws and regulations relating to privacy and security, including but not limited to, a business associate agreement under the HIPAA Privacy and Security Rules (45 CFR Parts 160 and 164), and any contractual obligation regarding privacy or security to which EOHHS is subject.

In addition, the Vendor must implement robust measures to protect against various cyber threats such as malware, phishing, and unauthorized access. The software solution must prioritize data encryption and secure authentication methods to ensure the confidentiality and integrity of data during transmission and storage. To maintain transparency and accountability, Bidders must provide audit tools for monitoring data access and usage, enabling organizations to track and review activities within the system.

In addition, scalability, data backup, and recovery capabilities are essential aspects that Bidders must address to accommodate the dynamic nature of data volumes and minimize the risk of data loss. The software solution must adhere to stringent compliance standards and regulations regarding data protection, ensuring that the organization remains in compliance with relevant laws and regulations.

This includes implementing adequate permissions capabilities and access controls to restrict access to sensitive data to authorized personnel only.

6.4 Service Levels

The Bidder is required to adhere to specific service levels to ensure the effective delivery of services. These include offering timely support and resolution for application-related inquiries, and ensuring that users receive assistance promptly and efficiently. Additionally, the Bidder must maintain high system availability with minimal downtime, providing ongoing support for system maintenance and updates to optimize performance. Uptime guarantees for the software platform are essential to ensure continuous availability, along with specified response times for technical support inquiries to address issues promptly. Resolution times for software issues should be minimized to mitigate downtime and disruptions effectively. Furthermore, the Bidder must provide service availability and reliability metrics to monitor system performance and ensure reliability, allowing for proactive maintenance and optimization efforts. Key metrics to monitor include, but are not limited to:

- **Platform Availability:** Ensuring a high level of reliability with an expected uptime of 99.999%.
- **Software Patch Availability:** Implementation of timely software patches with a comprehensive plan for deployment.
- **Performance Metrics:** Monitoring and optimizing page load times and application program interface (API) response times to enhance user experience.
- **Support Ticket Response Time:** Providing prompt and efficient resolution of support tickets, categorized based on severity levels.
- **Incident Response and Data Recovery:** Rapid response and recovery procedures in the event of cyber incidents to minimize data loss.
- **Continuity of Service:** Ensuring seamless continuity of platform services during service disruptions to minimize impact on operations.
- **Data Security and Privacy Measures:** Implementing robust encryption protocols for data at rest and in transit to safeguard sensitive information.
- **Service Level Agreement (SLA) Compliance and Remediation:** Committing to meeting SLA requirements and providing penalties or remediation plans in the event of non-compliance to ensure client protection and satisfaction.

6.5 Support

The Bidder is expected to provide comprehensive support services to facilitate the effective utilization of the software solution. This includes offering user training and technical support throughout the system implementation phase, ensuring that users are equipped with the necessary knowledge and skills to leverage the platform efficiently. The Bidder must promptly address any issues or concerns related to the software solution, providing timely assistance to resolve queries and mitigate disruptions effectively. The Bidder is responsible for furnishing comprehensive documentation and knowledge base support, enabling users to access relevant information and resources to address their needs independently.

7. RFP Timetable

The following table sets out key dates during the RFP process.

Activity	Date
Issuance of Solicitation	April 9, 2024

Deadline to Submit Written Questions	April 22, 2024
Response to Written Questions	April 29, 2024
Proposal Submission Deadline	May 14, 2024
Proposal Evaluation	June 2024
Scheduling of Invitations to Demonstrate and Discuss (IDD)	June 2024
Invitations to Demonstrate and Discuss (IDD)	June 2024
Review of References	June 2024
Best and Final Offer	July 2024
Award Recommendation	August 2024
Contract Negotiations	August 2024
Contract Execution and Project Kick-off	August, 2024
Go-Live	November, 2024

8. Small and Minority Businesses, Women’s Business Enterprises, And Labor Surplus Area Firms (2 CFR § 200.321).

Small, minority, women-owned, and Labor Surplus Area firms are encouraged to respond. Bidders are encouraged to self-identify if desired.

To the extent the Bidder is permitted and intends to utilize subcontractors under this RFP, the Bidder agrees to take affirmative steps to assure that minority businesses, women’s business enterprises, and labor surplus area firms are used whenever possible. Affirmative steps must include:

1. Placing qualified small and minority businesses and women’s business enterprises on solicitation lists;
2. Assuring that small and minority businesses, and women’s business enterprises are solicited whenever they are potential sources;
3. Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women’s business enterprises;
4. Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women’s business enterprises;
5. Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and
6. Requiring the subcontractor take the affirmative steps listed in paragraph (a) through I above.

9. Debarment or Suspension

No contractor (including subcontractors) that is debarred, suspended, excluded, disqualified, or otherwise ineligible for participation in State or Federal procurement will be considered for a contract. By submitting a proposal, the entity warrants that neither it, its subcontractors, nor their principals are excluded, disqualified, or otherwise ineligible for participation in State and Federal contracts.

10. Proposal Submission Requirements

10.1 Name, Address & Contact Information

Provide the Firm's legal name, corporate address, and telephone numbers/e-mail addresses.

10.2 Identify Key Staff

Provide a comprehensive narrative outlining the proposed organization and staffing approach for the various implementation-specific contractor activities as detailed in the RFP. This section of the proposal must encompass several key components. Firstly, a staffing plan is required, delineating the roles of each project team member throughout every project phase, along with their relevant experience. This plan must clarify the overall project organization structure and how the project team integrates with the broader Vendor organization. It must include job titles, functions, staffing levels, and resource calendars outlining staff requirements for each project activity, specifying onsite or off-site presence, and projecting onsite vs. offsite time distribution.

The staffing plan must address critical roles such as Project Manager, Solution Architecture and Configuration Lead, Data Migration/Conversion Lead, Data Integration/Interfaces Lead, Testing Lead, Training/Knowledge Transfer Lead, and Post-Implementation Primary Contact for Maintenance, Support, Operations, and Hosting Issues. The response must also disclose any intended use of other Vendors or individual consultants contracted by the Bidder to execute the services outlined in the RFP. It must include a discussion on the anticipated interaction between the Bidder project team and the MLCHC project team, a staffing contingency plan, and resumes of the project team members earmarked for these roles.

10.3 Subcontractors

Provide the name of any subcontractors that will be used to provide the services requested in the proposal and a description of what services the subcontractor will provide.

10.4 Industry Expertise and Experience

Provide a brief history of the software solution, a detailed description of the Bidder's industry expertise, experience, demonstrated past performance, staff qualifications (including applicable education and experience), and references demonstrating the quality of similar services provided to other companies similar to MLCHC.

10.5 Proposed Solutions/Strategy

Provide a detailed description of the Bidder's proposed solutions, strategy, and methodologies for meeting the requirements of each of the subsections in Section 6, Scope of Services, and address the flexibility of the system to allow for new programs and variations on servicing existing programs. This section of the Bidder's Proposal must also include the Bidder's value proposition and differentiators.

10.6 Approach to Implementation

Provide a comprehensive narrative outlining the proposed implementation approach. These activities include project organization and kickoff, requirements definition, elicitation, review, finalization, and documentation of solution requirements (both functional and technical), configuration and/or development of custom programming/code, knowledge transfer and testing, data and record migration, as-needed conversion, end-user and solution administrator training, deployment, go-live support, and solution change management post-go-live.

Describe the expertise and resource availability the Vendor will be seeking from MLCHC to support all the above activities. This must include details on the recommended computing infrastructure required, such as hardware and networking, that MLCHC will need to provide to facilitate the successful implementation and operation of the proposed solution.

10.7 Technology

Specify whether the solution is hosted or non-hosted and detail the required software, hardware, and network environments. The software solution must ensure 24x7 system availability and provide network plans, including security measures like firewall provisioning and intrusion detection. Disaster recovery and business continuity plans must cover risk management procedures and standby recovery environments.

Provide comprehensive security plans addressing administrative, physical, and technical controls, compliance with regulations, and incident response protocols. Documentation on continuous monitoring, security audits, change management, and past performance must be included to demonstrate capability and reliability.

10.8 Approach to Maintenance, Operations, and End User Support

Provide a detailed account of its strategy for meeting the various requirements pertaining to the maintenance, operation, and support of end users of the software solution. This includes, but is not limited to, defect removal, corrective maintenance, adherence to software warranty requirements, establishment of service level agreements, availability and responsiveness of Bidder staff, approach to supporting end users through help desk services and online documentation, measures to ensure the availability and performance of the software solution, procedures for addressing unscheduled service interruptions or downtime, and timely communication with MLCHC and its end users. Additionally, the Bidder must outline its approach to preventing unauthorized access to the software solution and describe its documentation processes.

10.9 Cost Proposal

Pricing Structure

Please specify whether your proposal is based on Time and Materials (T&M) or Firm Fixed Price (FFP).

- **Time and Materials (T&M):** This pricing model involves billing the client based on the actual hours worked by the contractor or Vendor, plus the cost of materials used.
- **Firm Fixed Price (FFP):** A firm fixed price contract sets a predetermined price for the project, which does not change regardless of the actual time or materials required.

Cost Breakdown

Provide a breakdown of costs associated with the project, including:

Labor Costs:

- Implementation Costs
 - Initial setup and configuration fees
 - Integration costs with existing systems
 - Customization fees for tailored solutions
- Support Post Launch

- Ongoing technical support and maintenance costs post-launch
- Helpdesk support fees

Materials/Software Costs:

- Annual Licensing or Subscription Costs
 - Software licensing fees for the duration of the contract
 - Renewal fees for subsequent years
 - Recurring subscription fees for access to software/services
- Document Storage Costs
 - Costs associated with document storage solutions
 - Fees for cloud storage services, if applicable
- User Costs
 - Fees per user
 - User training

Other Direct Costs:

- Any miscellaneous expenses directly related to the project.
- Travel expenses, if applicable
- Any additional charges for premium features or add-ons

Total Cost:

Comprehensive summary of all costs involved in the project, including one-time fees, recurring costs, and any applicable taxes or fees.

Payment Terms

Outline the proposed payment schedule, including milestones and payment terms.

Terms and Conditions

Include any relevant terms and conditions regarding pricing, payment, and contract renewal.

Service Level Agreements (SLAs)

If applicable, include proposed SLAs related to service availability, response times, and other performance metrics, along with any associated pricing implications.

Price Comparison

If applicable, provide a brief comparison of your pricing against competitors, highlighting any unique value propositions or cost advantages.

Discounts or Special Offers

Specify any discounts or special offers available, or conditions under which discounts may be negotiated.

10.10 List of References

Provide at least three (3) customer references whom MLCHC may contact. References must include the name of the company/entity, length of service, contact person, and present address and phone number. Also include the project dollar value and, if applicable, a discussion of identified issues and associated cost recoveries/penalties/damages. Please use the format found in Attachment A below.

10.11 Additional Vendor Offerings

Please provide any additional offerings that would increase the value of the relationship through improved services or reduced costs to MLCHC (including fee-for-service and no additional charge offerings).

10.12 Proposal Submission Deadline

Proposal submissions must be received by the proposal submission deadline set out in Section 7 (the "Proposal Submission Deadline"). Submissions received after the Proposal Submission Deadline will not be considered.

10.13 Method of Proposal Submission

To submit your proposal for the RFP, please follow the instructions below:

1. **Submit Your RFP to Asana:** Please navigate to the following link <https://form.asana.com/?k=-UMAGk3bikysSQ-otxd2dw&d=187353465484602> to access the Asana form for RFP submissions.
2. **Name:** Enter your full name in the designated field.
3. **Email address:** Provide an email address where we can reach you for any clarifications or updates regarding your proposal.
4. **RFP response attachments:** Upload your proposal and any relevant files using the attachment field. This may include your cover letter or any other documents related to your proposal. You can either select the files by clicking on "Select a file..." or drag and drop the files directly into the attachment field.

Once you have filled in your name, and email address, and attached all relevant files, click on the "Submit" button to send your RFP response. You will receive a confirmation email after you submit the form. If you have any questions or encounter any issues during the submission process, feel free to reach out to us for assistance.

10.14 Questions

MLCHC will accept questions pertaining to this RFP from all potential Bidders electronically. Questions shall be directed to Giselle Saravia, at the following email address: GSaravia@massleague.org. Questions will be accepted until 5:00 pm EST on April 22, 2024. If it becomes necessary to clarify or revise this RFP, such clarifications or revisions will be by addendum.

11. Invitation to Demonstrate and Discuss (IDD)

A deep dive platform meeting may occur virtually via a Zoom meeting by invitation during proposal evaluation. This meeting is intended to provide Bidders the opportunity to meet with MLCHC leadership, and provide module-specific demonstrations in a question/answer forum allowing MLCHC the opportunity to fully understand the Bidder's capabilities, and provide respondents with a better understanding of the requirements of this RFP.

12. Evaluation Criteria

MLCHC intends to partner with one Vendor. The awarded Vendor will offer MLCHC the best financial and service package in response to the requirements contained herein. In considering the responses submitted by each Bidder, MLCHC will consider the following at a minimum and as applicable: the

ability, capacity, and skill of the respondent to perform; the character, integrity, and quality of the respondent; the quality of past performance by the Bidder; and the competitiveness of the Bidder's financial proposal. MLCHC and EOHHS will evaluate multiple criteria to select the most appropriate software solution.

Attachment A: List of References

List three references to which you have supplied products/services within the last five (5) years.

Organization Name: _____

Address: _____

Contact Person: _____

Contact Telephone: _(_____)____ - _____ Contact Email: _____@_____

Time period services provided:

Description of services provided:

Project issues and cost recoveries/penalties/damages (if applicable):

Organization Name: _____

Address: _____

Contact Person: _____

Contact Telephone: _(_____)____ - _____ Contact Email: _____@_____

Time period services provided:

Description of services provided:

Project issues and cost recoveries/penalties/damages (if applicable):

Organization Name: _____

Address: _____

Contact Person: _____

Contact Telephone: _(_____)____ - _____ Contact Email: _____@_____

Time period services provided:

Description of services provided:

Project issues and cost recoveries/penalties/damages (if applicable):