

# Request for Proposal

## EMERGENCY MANAGEMENT TEXTING SOFTWARE

**MARCH 27, 2020**

**RESPONSES DUE MAY 1, 2020**

This solicitation should not be interpreted as a contract (implicit, explicit, or implied), nor does it imply any form of agreement to any potential candidate. In addition, no inference should be made that Trillium will purchase and/or implement in the future any of the programs or services proposed by the respondents.



201 West First Street  
Greenville, NC 27858-1132

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**ACCREDITED**  
Health Network  
Expires 03/01/2022



**ACCREDITED**  
Health  
Utilization  
Management  
Expires 03/01/2022



**ACCREDITED**  
Health Call Center  
Expires 03/01/2022

## BACKGROUND

Trillium Health Resources is a local governmental agency (LME/MCO) that manages mental health, substance use, and intellectual/developmental disability services in eastern North Carolina. We partner with health care providers and community stakeholders to build and strengthen foundations of well-being, provide individuals with the resources to weather life's storms, and help deepen connections between citizens and their communities. Together with our partners and state leadership, we are invested in the future of the public behavioral health system for the benefit of our region. Our staff are located in 8 offices with a large number of staff working remotely.

## PURPOSE

Trillium Health Resources is requesting proposals for an emergency management texting software to communicate with employees and potentially our provider network on an as-needed basis.

Responses to this RFP should focus on the vendor's offerings, capabilities, and experience with texting platforms.

In addition, responses should include discussion about the platform's road map and how additional features will enhance the platform.

## SCOPE OF WORK

### Reach Staff in Emergencies

The primary purpose of the software system is to allow two-way communication with employees during periods when normal business operations are disrupted.

### Reach Providers in Emergencies

Trillium may also use this solution to communicate emergency messages with our Provider Network.

### Disclaimers

This document is the proprietary and exclusive property of Trillium, except as otherwise indicated. No part of this document in whole or in part may be reproduced, stored, transmitted, or used for design purposes without prior written permission from Trillium.

The information contained in this document is subject to change without notice. Trillium, at its discretion and without explanation to the prospective vendor, can at any time choose to discontinue this bid without obligation to such prospective vendor.

Trillium is not responsible for any expenses incurred by the vendor in preparing and submitting a response. The vendor's response or any contract discussions or negotiations will be at the sole cost of the vendor.

No statement by Trillium may be considered a request or justification to increase or change inventory, staff, facilities, business relationships, or internal business processes. All actions by the vendor in response to this RFP, or subsequent discussions or negotiations, should be taken with the clear understanding that neither this RFP nor subsequent actions or omissions by Trillium shall in any way obligate Trillium to pay or reimburse the vendor for any costs or expenses the vendor incurs in conjunction with the RFP process.

All responses, inquiries and correspondence related to this RFP, including all reports, charts, displays, schedules, exhibits, and other documentation produced and submitted by the vendor as part of the response, shall become the property of Trillium once submitted.

After RFP responses are received and evaluated, vendors will be invited to present a demo and may be asked to participate in Q&A sessions. Trillium will make every attempt to schedule each presentation at a time and location that is agreeable to the vendor.

## REQUIREMENTS AND TIMELINE

### Requirements

Requirement	Meets Standards	Does Not Meet Standards
Send broadcast text messages to staff		
Send broadcast voicemail messages to staff		
Send email messages to staff		
Send messages with response options		
Allows text receivers to respond to messages		
Allows text receivers to check in their status		
Allows text messaging to our Provider Network		
Application has a mobile version that displays messages		
An unlimited number of text messages can be sent		
Sends text messages to a geofence group		

Requirement	Meets Standards	Does Not Meet Standards
Allows staff to update their contact information		
Allows a Trillium IT staff to serve as the system administrator		

### Timeline

Milestone	Due Date
RFP responses due	May 1, 2020
Review responses	May 15, 2020
Vendor demonstrations	May 15 – May 31, 2020
Select vendor	June 1, 2020
Go-live	September 1, 2020

## SOFTWARE CAPABILITIES

- 🌱 Provide the total number of customers using your platform.
- 🌱 Provide detailed descriptions of unique features and customizable options.
- 🌱 Provide a detailed description of your platform's privacy and HIPPA compliance design.
- 🌱 Describe how your platform fulfills Trillium's requirements and how it can support our staff and network of providers.
- 🌱 Provide a detailed description of your platform's hosted or onsite software design architecture, offerings, and options.
- 🌱 Explain the platform's internal and external data exporting and reporting capabilities. List any add-ons or third-party software required for data management.
- 🌱 Describe sign-on verification capability. Trillium uses Active Directory/Azure.
- 🌱 Describe the software's capabilities for integrating with Cisco Call Management software and Cisco Jabber. If the software does not have this capability, please indicate that.
- 🌱 Provide external connection requirements such as VPN, Whitelist or any other data exchange prerequisites or limitations.
- 🌱 Describe your training plan for training 5 system administrators.
- 🌱 Describe the software's reporting capabilities.
- 🌱 Describe your help desk/support procedures.

## FORMATTING REQUIREMENTS

Trillium’s goal is to review all proposals. However, this goal must be balanced against Trillium’s obligation to ensure equitable treatment of the received proposals. **For this reason Trillium has established the following formatting requirements. If you do not adhere to these requirements, your proposal will be screened out and returned to you without review.**

- 🌱 All proposals must be submitted electronically through the [Smartsheet](#) application.
- 🌱 Any attachment pages must be typed in black, double-spaced, using a font of Times New Roman 12, with 1” margins.
- 🌱 Applicants must use the sections/headings listed under Required Proposal and place the required information in the correct section.
- 🌱 Black print should be used throughout your application, including any charts and graphs.
- 🌱 Materials with printing on both sides will be excluded from review.
- 🌱 Attached pages should be clearly labeled and numbered consecutively from beginning to end so that information can be located easily.

## REQUIRED PROPOSAL COMPONENTS

- 🌱 Face Sheet (provided as part of the electronic application) - organizational information such as legal name, employer/taxpayer number, address, contact information for leadership, etc.
- 🌱 Cover Letter (Attachment A)
  - Summary of proposed project and intent to submit proposal
  - Summary description of strategy/plan and how it meets the project goals and measurable objectives.
  - Letter must be signed by an officer of the company
  - Project Narrative, including all 5 sections listed below and supporting documentation, as needed (insert # of characters or pages under each Section)
- 🌱 **Section A: Company/Organizational Information**
  - Description of the company and its professional history as it relates to the services sought under this RFP.
  - Three external references from clients who have received similar services that have occurred within the past five years.
  - Licensing and/or bonding information

- ▲ Complete copies of the organization’s financials for the last fiscal year; including the audit opinion, the balance sheet, statements of income, retained earnings, cash flows, management letters, and the notes to the financial statements (Attachment C) or
- ▲ If independently audited financial statements do not exist, the provider/vendor should state the reason and submit sufficient information to be evaluated.

### ▲ **Section B: Project Plan**

- ▲ Description of what is being proposed and how it will be accomplished, as related to the intent of the RFP and performance measures identified in Section E: Data Collection and Performance Measurement.
- ▲ Schedule/timeline for the service or project, which will serve as the basis for monitoring progress and adjusting project timelines as necessary, including:
  - All activities required to accomplish the key objectives of the project.
  - Target dates for the proposed activities, where appropriate.
  - Information on the proposed start and completion dates of the key objectives and activities.
- ▲ Technical Specifications: Include any equipment, software, facility impact, etc., if applicable.
- ▲ Installation and maintenance plans, if applicable.
- ▲ Project Management, including Performance Management and Security/Fault Management, if applicable.
- ▲ Education/Training and Supervision.

### ▲ **Section C: Personnel**

- ▲ Provide a comprehensive chart of personnel positions for the project/services, including the CEO any other executive/leadership positions, to reflect the role of each position, their level of effort and qualifications (Attachment D).
- ▲ Personnel charts for any subcontractors used, if applicable (Attachment E).

Personnel charts may be submitted as attachments, labeled and paginated.

### ▲ **Section D: Budget**

- ▲ Line Item Budget (Attachment F)
  - The budget should be complete and include all the costs of any personnel, supplies, and activities required by the service or project.
  - Ensure that the service or project is feasible within the budget created.
  - Make sure the budget is reasonable and is based on actual costs.
    - Detailed Budget Narrative
  - The budget narrative must describe each budget item and relate it to the appropriate service/project activity.

- It must closely follow the content of the budget detail worksheet and provide justification for all proposed costs listed in the budget worksheet (particularly, supplies, travel, and equipment) and demonstrate that they are reasonable.
- The narrative must explain how any fringe benefits were calculated, how any travel costs were estimated, why particular items of equipment or supplies must be purchased, and how overhead or indirect costs, if applicable, were calculated.
- ▲ A Budget Summary Form must be used to summarize all costs and expenses.
- ▲ **Section E: Data Collection and Performance Measurement**
- ▲ Documentation of the vendor's ability to collect and report on the required performance measures.
- ▲ Description of the plan for any required data collection, management, analysis and reporting, if applicable.

## PROPOSAL EVALUATION INFORMATION

- ▲ All proposals will be reviewed for compliance with the mandatory requirements stated in this RFP. Proposals deemed non-responsive will be eliminated from further review.
- ▲ The Trillium Contract Manager or appointed person may contact the Vendor for clarification of any response.
- ▲ Responsive proposals will be evaluated on the factors that have been assigned a point value. The proposal will be reviewed and scored according to the quality of your response to the requirements in Sections A-E.
- ▲ The three Vendor(s) with the highest score(s) will be invited to give a demonstration.
- ▲ Finalist Vendors may be asked to submit revised proposals or make a presentation for the purpose of obtaining best and final offers. If so, points will be recalculated accordingly, and points awarded will be added to the previously assigned points to attain final scores.
- ▲ The responsible Vendor whose proposal is most advantageous to Trillium, taking into consideration the evaluation factors, will be recommended for contract award. Please note, however, that a serious deficiency in the response to any one factor may be grounds for rejection regardless of overall score.
- ▲ Recommendations are made to Executive Management who has the final decision-making authority.



## ADMINISTRATIVE INFORMATION

- 🌱 Award Notices - All organizations will receive notification from Trillium when awards are determined.
- 🌱 The organization awarded the RFP must comply with all terms and conditions of the awarded contract. These terms and conditions will be provided in the award contract for signature.
- 🌱 The awardee will be held accountable for the information provided in the proposal relating to performance targets. Trillium will consider the organization's progress in meeting goals, objectives and schedules based on the contracted criteria. Failure to meet stated goals, objectives and schedules may result in suspension or termination of the contract, or in reduction, withholding and/or repayment of funding.

## TRILLIUM CONTACT INFORMATION

### **For questions about this RFP contact:**

**Name:** Christy Flentje  
**Position:** Project Analyst  
**Address:** 3809 Shipyard Blvd, Wilmington, NC  
**Phone Number:** 1-866-998-2597  
**Email Address:** [Christy.Flentje@Trilliumnc.org](mailto:Christy.Flentje@Trilliumnc.org)