

Request for Proposal (RFP)

Seeking a dynamic resident management system with core data structure and strong ability to integrate with other data systems.

On behalf of multiple Minnesota government entities, MnCCC and the Human Services User Group is seeking a qualified vendor to provide a resident management system. As a joint powers organization, MnCCC works closely with many Minnesota counties. MnCCC has gathered the Human Services User Group, which consists of representation from multiple Minnesota counties. Primary goals with this RFP process are to identify a vendor partner who will: 1) provide a quality resident management system that meets various county needs; 2) ensure the system meets all compliance and legal requirements, including for the timely generation of reporting and documents for internal and external parties, as those requirements are defined in compliance section listed in this RFP; 3) work with the Human Services User Group to identify develop, and deliver enhancements on a scheduled basis as requested while maintaining standardization across counties; and 4) demonstrate a dedication to ongoing quality and solution-oriented support. The User Group is especially interested in establishing a long-term partnership with a vendor committed to build out several integrations and identify efficiencies across many areas.

We anticipate the selection of a vendor or vendors by May 10, 2024.

Confidentiality

This document is for the sole use of the intended recipient and may contain confidential and privileged information. Any unauthorized review, use, disclosure, distribution or copying is prohibited.

Proposal Costs and Conditions

All costs incurred in the preparation of a proposal responding to this RFP will be the sole responsibility of the vendor and will not be reimbursed by MnCCC. All vendors participating in this RFP process and/or submitting a proposal agree that MnCCC and the Human Services User Group may select or reject a proposal or vendor for any reason, and MnCCC and the Human Services User Group is not obligated to reach a final contract selection as a result of this process.

About MnCCC

Established in 1978, Minnesota Counties Computer Cooperative (MnCCC) works with all Minnesota Counties as a joint powers organization facilitating services and training while providing software and other cost-effective measures to substantially reduce technology costs for counties, cities, and agencies.

Joint Powers Organization

A joint powers organization is an entity permitted under the laws of some U.S. States, including Minnesota, whereby two or more public authorities (e.g. local governments, counties, or utility or transport districts), may jointly exercise any power common to all of them. Joint powers authorities may be used where:

- an activity naturally transcends the boundaries of existing public authorities.
- by combining their efforts, public authorities can work together on cooperative purchasing.

A joint powers authority is distinct from the member authorities; they have separate operating boards of directors. These boards can be given any of the powers inherent in all of the participating agencies. The authorizing agreement states the powers the new authority will be allowed to exercise. The term, membership, and standing orders of the board of the authority must also be specified.

For more information about Minnesota statutes governing joint powers organizations such as MnCCC, view the Minnesota Legislative statutes here: <https://www.revisor.mn.gov/statutes/cite/471.59>

Communications, Inquiries & Questions

All proposal submissions, questions and inquiries should be directed to: rfp@mnccc.gov and **MUST** include **Human Services Data System** in the subject line of the email. Vendors should not use other forms of contact, including by phone, individual emails, or soliciting county staff directly. All formal communication from MnCCC will come via the rfp@mnccc.gov email account, MnCCC's RSVP mass email system, directly from MnCCC staff, or through the project consultant (Joel Barker, Great River Strategies).

Project Timeline

Proposals are due via email (rfp@mnccc.gov) by Friday, March 1, 2024 at 5 p.m. CT.

A completed RFP application (see last two pages of this RFP document) – due February 9 at 5:00 p.m. CT to be included on Q&A responses and initial Q&A session with the RFP user group.

Schedule benchmarks: Vendors are encouraged to note these dates prior to submitting a proposal. MnCCC may adjust the schedule as needed. (All dates are 2024 unless otherwise indicated.)

RFP Release	January 19
Security Studio evaluation available to vendors upon request	February 1
RFP initial questions due (via email)	January 31
Release of user group answers to initial questions	February 12
RFP meeting with vendors and user group	February 15
Proposal due date	March 1
Notification of finalist vendor(s) and next steps	March 18
User group follow up with all vendors with a status update	March 22
Supplemental information due (as requested by the user group)	March 29

Finalist vendor demonstrations	April 11-19
Meetings with vendor references	April 22-30
Second round of demonstrations (as needed)	May 1-9
Vendor finalist selection by	May 10
Notification of vendor next steps	May 15
Contract negotiations	May 15-June 14
Contract signature date (goal)	June 28

About Human Services User Group

The Human Services User Group is made up of county employees from several Minnesota counties. The members fill various positions within the county, but most hold roles under human services, technology services, or other functions for their respective county. Committee members have a great deal of experience in their area of expertise and are prepared to fully assess and evaluate options for a new county client management system. The members are keenly interested in identifying a system that centralizes information and supports both consistent client information across many different services lines while also providing integrations with many other county and state data systems.

System and Vendor Requirements

The Human Services User Group is looking for a software system that will meet the diverse needs of county governments. The system should serve all core client demographic management functions needed for county human services so that counties can uniquely identify residents being served across multiple program/service areas (e.g., human services, public health, veteran services) and provide a more holistic view of county services to individual residents. The vendor should be committed to training and quality support for county staff. The selected vendor will be expected to participate in user group meetings.

The Human Services User Group has identified key requirements for a new system. The user group will not only evaluate proposals based on their inclusion of these items, but during demonstration the functionality and performance of tasks will be a key metric for evaluation.

System requirements for the new client management system are:

- Strong system framework and structure to support a high degree of data fidelity, including the ability to review new records or regularly search for duplicate records to limit the creation of duplicate client records, and more broadly, the ability to regularly review, clean, and maintain accurate client records and information

- Dynamic and open integration with other data systems, including the ability to connect and integrate with other data systems that may be internal to counties or external, including State of Minnesota data systems, including but not limited to third party vendor systems, partner or agency systems, APIs, web services, and data imports or exports
- Standardized data structure as part of a core system used by all counties, inclusion of a common data structure to support consistent data reporting, data analytics, and state and outside-agency reporting
- Web Portal, including an accessible, online portal for clients to securely access their account, including the ability for clients to view current status, update personal information, upload data and documents, including an access and identify management system.
- Customization – Ability for counties to optionally add internally created customization to the system to meet internal county business needs without negatively impacting the core demographic information fields that remain consistent across all counties
- Modular – Core system with a solid basic framework that both meets that full system requirements for all Minnesota county needs, but includes optional modular add-ons or additional modular feature-set or access to further development for enhanced functionality if and when counties opt in for increased abilities
- Record portability – transmissible functionality, including the ability for client case files to be accessed or fully transferred between counties or other agencies, including the retention of customizations
- Secure communication portal – accessible, online interface for customer services support providing a client the ability to submit questions and securely communication with county staff
- Data exchange and automated integration with other data systems that is required
 - [State System Information](#)
 - PRISM - Providing Resources to Improve Support in Minnesota
 - MEC2
 - SSIS
 - MAXIS
 - SMI – Shared Master Index
 - MN Choices
 - MMIS – Medicaid Management Information System
 - [METS](#) – Minnesota Eligibility Technology System
 - Microsoft 365
 - [PH-Doc by Avenu](#)
 - DHS Data Warehouse

- Additional integration with other data systems that may be desired or move into a required category depending on the features and capabilities of the selected data system
 - Microsoft Dynamics
 - [CaseWorks by NCT](#)
 - [CSTS by Strategic Technologies](#)
 - Nightingale Notes
 - Microsoft Power Platform
 - Laser Fiche
 - Hyland OnBase EDMS
 - Winne (WIC)
 - Northwoods Compass
 - Northwood Traverse
 - [QFlow by ACF Technologies](#)
 - Contact Centers including: Genesys Cloud and Anywhere 365
 - [Captivated](#) Business Texting
 - Qualtrics

Compliance and Regulatory Requirements

Vendors are asked to review the following resources to gain a deeper understanding of the compliance and regulatory requirements for the selected software solution:

- [HIPAA](#)

Future Compliance and Regulatory Needs

Vendors are asked to review the following resources to gain a deeper understanding of the compliance and regulatory potential requirements for the selected software solution:

- [FTI](#)
- [FHIR Standards](#)
- [MnCCC Vendor Contract Guidelines](#)
- [USCDI](#)

Ongoing Support & Maintenance

MnCCC and the Human Services User Group are seeking a long-term partner. In addition to a quality software product, the vendor should provide a high-quality level of ongoing support for the software tool. In addition to support, the vendor should outline a robust maintenance plan and schedule to ensure the software tool is well maintained and continues to function at a high-level of performance.

It is expected that the selected vendor will participate in monthly and quarterly user group and advisory committee meetings and select subcommittee meetings.

System Requirement Assessment (SRA)

As part of a complete proposal, vendors are expected to complete the System Requirement Assessment (SRA). The SRA will outline technology requirements, including end-user system criteria, that is required by your solution.

Link to the SRA: <https://forms.gle/UiBdRsvrc2oZH4k6>

Security Assessment

All finalist vendors will be required to complete a security assessment through Security Studio (<https://securitystudio.com/vendors/>). A Security Studio score will be required by March 1 for any finalist to move forward with consideration.

MnCCC has established a Security Studio account and will facilitate the connection with Security Studio upon vendor request as early as February 1. Vendors are encouraged to complete the assessment and receive a score prior to submitting their proposal. This provides an opportunity to make recommended changes discovered through the assessment and improve a score prior to submitting a proposal. A vendor score will not be considered complete until March 1. All finalist vendors will be required to have a completed score provided by Security Studio on March 1.

To request access to the Security Studio assessment, email rfp@mncce.gov with the subject: "Human Services RFP Security Studio request".

Evaluation & Selection Process

The Human Services User Group has been established to oversee this RFP and to answer questions, review proposals, evaluate vendors, and make a final vendor selection.

Key evaluation considerations for the Human Service User Group are:

- Strength of proposed product
- Vendor experience, longevity, and company stability
- Resumes of key staff assigned to the system and their role during the project and ongoing support
- Description of and references for past work to illustrate:
 - Proof of past software tool customization
 - Commitment to customize the product to meet Minnesota requirements
 - Proof of dedication to quality customer service
- Strong and clear plan for design, conversion, implementation, pilot testing, and training
- Financial feasibility of the proposal

- Completed security review and assessment score (through Security Studio)
- Proposed solution compliance with data practices and legal requirements
- Illustration of desire for a long-term commitment and partnership

Once a contract is in place, the Human Services User Group will continue to oversee the relationship with the successful vendor and will serve as a clearinghouse for customization requests made by member users. The vendor is expected to honor customization requests put forth by the group by demonstrating a willingness to provide timely quotes, design feedback and development timelines. The vendor will maintain a standard product package that will be used by group members and will direct individual customization requests to the group for evaluation and approval.

RFP Attachments (Linked)

The following supportive documents are attached to this RFP.

- [MnCCC Bylaws](#)
- [MnCCC Vendor Contract Guidelines](#)

Costs

MnCCC is looking for a cost-effective solution to meet county software and support needs. As the project is funded by taxpayers, it is essential that the product pricing is competitive in the open market. Custom development costs of the system will be addressed during the RFP process and prior to contract finalization.

MnCCC will not be able to guarantee an exact quantity of counties until pricing levels have been established and a final contract is in place. It is expected that your proposal outline pricing based on an undefined number of counties. You may outline price breaks at different levels of counties and/or users. The vendor should provide recommendations, if applicable, for alternative options for process improvement, cost reduction, and staff efficiency.

Testing and Implementation

It is expected that quality assurance (QA) testing is the responsibility of the vendor. A new software will only be deployed by MnCCC after it has passed the vendor's internal QA testing. Following the vendor QA testing, MnCCC subject matter experts will perform User Acceptance Testing (UAT) as the final stage of testing before the software is certified for use. MnCCC requires access to all software defect tracking systems used during the QA lifecycle and will give final approval before any customization or defect resolution is migrated to the User Acceptance Testing environment.

The Vendor is expected to provide a description of the Software Development Life Cycle utilized. This description should outline the testing and deployment procedures of custom software to meet the needs of the project. Detailed items that must be addressed in the Software Development Life Cycle are:

- Training

- Methodology
 - List any options
 - Outline any requirements
- Data Conversion
 - Conversion Methods
 - Conversion Process
 - Data Extraction method and proposal
 - Schedule outline
 - Data validation process
- Timelines
 - Provide a proposed Implementation Chart
- Vendor/Client Responsibilities
 - Outline expectations of MnCCC during Implementation
 - Outline your services provided

Functionality and Usability

It is an important expectation of MnCCC and the Human Services User Group that the software tool is user-friendly. Your proposal should outline the usability test plan and include answers to the following:

- In what stage(s) of the development process is usability testing utilized?
- Before testing occurs, what is the process that is used to ensure a successful test?
- Describe how tests are conducted, including a past example from at least one past client included on your reference list, and outline the client expectations (*e.g. testing equipment, scenarios outlines, preparation to answer client questions.*)
- How are usability test results measured and what is reported to the clients and the software designers?
- How are findings then incorporated into the software; and, what is the typical timeframe?
- What is the company interaction as participant's test (e.g. how are the tests moderated)?
- What involvement is expected by test participants? (*e.g. what are the moderators and/or company representatives doing during the test, for example are they listening to feedback as testing occurs, probing for enhanced discussion that could lead to better design, or waiting until all is done and then following up.*)
- How are participants measured during testing?
- How are results measured and reported to the software designer?
- What is the follow up with those that tested the software?

Proposals

All proposals should be broken into the following distinct sections:

- Completed Application for Human Services System Request for Proposal (RFP) form (2-pages)
- Overview and history of your company (2-page limit)
 - Primary contact person (name, address, phone number, email address)
 - Include experience with providing similar services
 - Disclosure if your company is under acquisition or in active acquisition conversations
- Description and history of software tool as it relates to a resident management system (3-page limit)
- Provide a detailed configuration for the proposed system (3-page limit)
- Training proposal (2-page limit)
 - Outline training for end-users (users at counties)
 - Outline technical staff training requirements
 - Propose trainings your development and engineers will undertake as part of this partnership
- Customer care and support (3-page limit)
 - Software ongoing support and maintenance proposal
 - Describe in detail your method of support to clients to answer questions, locate information, review technical requirements, and handle support cases
 - Provide information on how your support case management system works
 - Do you provide off hour support including weekends and holidays? If so, describe.
 - How are change requests handled and prioritized (e.g. upgrades, new legislation requirements)
 - Describe your process for support case resolutions between yourself and a client
 - Provide average turnaround time statistics for client support requests
 - What other additional resources might you have for support?
- Software longevity roadmap (3-page limit)
 - State of commitment to a long-term partnership with MnCCC (2-page limit)
 - Your firm's proposed vision for the software tool broken out over (3-page limit)
 - 3 years, 5 years, 10 years
- Testing and implementation plan, including Software Development Life Cycle outline (3-page limit)
- Responses regarding Functionality and Usability - per page 7 & 8 (4-page limit)
- Cost and fees broken down as follows (2-page limit)
- **Total costs and fees to include:**
 - Initial Solution Costs
 - Software solution development costs
 - Customization & integration costs (if applicable)
 - Implementation & installation costs (if applicable)
 - Data conversion costs (if applicable)
 - Hardware costs (if applicable)
 - Ongoing Costs, Annualized
 - License fees (if applicable)
 - Third-party software/hardware recurring costs (please detail)
 - Other recurring cost (please detail)

- Costs associated with attending onsite meetings and trainings (including travel expenses)
 - Rates for future enhancement activities over the contract period for:
 - Project Management
 - Design
 - Application Development/Customization/Testing
 - Training Development & Delivery
- Implementation and installation plan and schedule for roll out of pilot test (3-page limit)
- Reference list (Required)
 - List all government contracts in the State of Minnesota or surrounding states within the past 10 years
 - Client name
 - Client address
 - Contact person - must be a direct users of the software tool (including their email address and phone number)
 - Minimum of three (3) current non-government clients including the following information
 - Client name
 - Client address
 - Contact person - must be a direct users of the software tool (including their email address and phone number)
 - Current product usage (outline the level of services and/or modules, if applicable)
 - Client size (number of users and other applicable information)
 - Client contract duration (number of years they have been a client)
- Acknowledgment of the following (1-page limit)
 - Confirmation that the proposed timeline is feasible for your firm
 - Confirmation that your firm can meet MnCCC's Vendor Contract Guidelines
 - Confirmation that your firm will meet the required participation in monthly and quarterly user group and advisory committee meetings and select subcommittee meetings
 - Confirmation your firm will meet WCAG 2.1 Accessibility Compliance by December 31, 2024 or roadmap toward compliance, as applicable
 - Confirmation your firm and/or a staff representative of your firm will complete the following and your proposed timeline for completion of
 - Quality Assurance assessment
- Systems Requirement Survey (SRA) completion (online survey - once you complete MnCCC is notified)
- Completed Security Studio assessment (security score)

Proposals should be limited to no more than thirty five (35) pages total.

All proposals should be submitted in electronic form sent via email (to rfp@mnccc.gov) in Adobe PDF format no later than Friday, March 1, 2024 at 5 p.m. CT. **Review of proposals will begin on March 4, 2024; vendors are encouraged to participate in the scheduled Q&A session on February 15, 2024 to receive further information and have the opportunity to ask questions.**



APPLICATION FOR HUMAN SERVICES SYSTEM REQUEST FOR PROPOSAL (RFP)

COMPANY & CONTACT INFORMATION

CONTACT NAME:

CONTACT EMAIL:

CONTACT PHONE:

COMPANY NAME:

ADDRESS:

CITY, STATE, ZIP:

CORPORATE HEADQUARTERS (if different location):

COMPANY DESCRIPTION

COMPANY GENERAL INFORMATION:

EXPERIENCE

In each of the areas below, describe the staff, systems, and processes you have in place. Use as much space as you need. You may also provide the information in an attachment by referencing the attachment in each section below.

MANAGED IT SERVICES

EXPERIENCE WORKING WITH A JOINT POWERS ORGANIZATION AND/OR A SOFTWARE USER GROUP

SOFTWARE TESTING PROCESS & PROCEDURES

SOFTWARE VERSION CONTROL & DOCUMENTATION

STAFF SKILLS AND TRAINING

EXPERIENCE WITH USABILITY, UX, MASS-EMAILING SYSTEMS, TECHNICAL SUPPORT, CUSTOMER SERVICE, AND OTHER APPLICABLE EXPERIENCE

PAST PROJECTS AND POSITIVE REFERENCE FEEDBACK

SUPPORT

PLEASE DESCRIBE YOUR CURRENT SOFTWARE SUPPORT PROCESS AND TRACKING:

ADDITIONAL (OPTIONAL) INFORMATION

Use this space to include other applicable information not included in application or outlined in RFP.

Completed application and signed copy of Confidentiality Agreement must be returned to MnCCC by 5:00 PM CT on February 9, 2024. Completed forms must be sent via email to lisa@mnccc.gov and emily@mnccc.gov with the subject "ATTN: Human Services Relationship Management RFP Review Team"