

Request for Proposal

Help@Hand Screening Tool Project

Applications due by 5:00pm on Thursday, February 18, 2021



**MONTEREY COUNTY
BEHAVIORAL HEALTH**

Avanzando Juntos Forward Together



**LOS ANGELES COUNTY
DEPARTMENT OF
MENTAL HEALTH**
hope. recovery. wellbeing.

Table of Contents

1	<u>PROJECT BACKGROUND</u>	4
2	<u>PURPOSE OF RFP FOR SERVICES</u>	6
3	<u>PROJECT SCOPE OVERVIEW</u>	7
3.1	DESIGN SCOPE OF WORK	7
3.1.1	DELIVERABLE 1 - DEVELOP PROJECT PLAN & SCHEDULE	9
3.1.2	DELIVERABLE 2 - CONDUCT RESEARCH	9
3.1.3	DELIVERABLE 3 - FUNCTIONAL DESIGN DOCUMENT	9
3.1.4	DELIVERABLE 5 - TRAINING MATERIALS	9
3.2	TECHNOLOGY SCOPE OF WORK	10
3.2.1	DELIVERABLE 1 – TECHNICAL DOCUMENTS	12
3.2.2	DELIVERABLE 2 - APPLICATION LANDSCAPE/ENVIRONMENTS	13
3.2.3	DELIVERABLE 3- APPLICATION PROTOTYPE	13
3.2.4	DELIVERABLE 4 - TEST STRATEGY AND DOCUMENTS	13
3.2.5	DELIVERABLE 5 - TRAINING STRATEGY AND DOCUMENTS	14
3.2.6	DELIVERABLE 6 - PRODUCTION DEPLOYMENT	14
3.2.7	DELIVERABLE 7 - POST GO-LIVE SUPPORT	14
3.2.8	DELIVERABLE 8 - DATA EXTRACTS	15
3.2.9	DELIVERABLE 9 – STATUS REPORTING	15
3.2.10	DELIVERABLE 10 – MAINTENANCE & OPERATIONS	15
4	<u>AGREEMENT TERMS</u>	15
5	<u>RESPONSE CONTENTS</u>	16
5.1	RESPONSE CONTENTS – GENERAL	16
5.2	RESPONSE CONTENTS - DESIGN	16
5.3	RESPONSE CONTENTS - TECHNOLOGY	17
6	<u>ROLES AND RESPONSIBILITIES</u>	18
6.1	DESIGN SERVICES	18
6.2	TECHNOLOGY SERVICES	18
6.3	COUNTIES OF MONTEREY (MCBH) AND LOS ANGELES (LACDMH)	19
6.4	CALMHSA	19

7	SUBMISSION INSTRUCTIONS AND REQUIREMENTS.....	20
7.1	PROPOSAL TIMELINE	20
7.2	SUBMITTAL ADDRESS.....	20
7.3	RFP QUESTIONS AND CLARIFICATIONS	20
7.4	BIDDERS CONFERENCE	21
7.5	WITHDRAW.....	21
7.6	REVIEW OF APPLICATIONS.....	21
7.7	NON-COLLUSION	22
7.8	NEGOTIATIONS WITH POTENTIAL PROPOSERS	22
7.9	PROTEST PROCEDURES	22
7.10	NOTICE REGARDING PUBLIC RECORDS ACT REQUEST	22
7.11	FORMAT OF PROPOSAL	23

1 Project Background

The California Mental Health Services Authority (CalMHSA) is an independent administrative and fiscal government agency focused on the efficient delivery of California mental health projects. CalMHSA was established by California counties in June 2009, as a Joint Powers Authority (JPA). CalMHSA's member counties work together to develop, fund, and implement mental health services, projects, and educational programs at State, regional, and local levels. CalMHSA is headed by a separate Board of Directors composed of representatives of Member Counties and an Executive Committee comprised of officers and Statewide Regional Representatives. CalMHSA operates within the statutes governing JPA entities and complies with the Brown Act open meeting requirements.

CalMHSA, with the support of participating counties and cities has implemented a project called Help@Hand, which aims to build a complementary support system that offers a bridge to care, helps identify early signs of mental health changes, offers timely support, removes barriers, and seeks to include new avenues of care for communities not connected to conventional county services. Monterey County Behavioral Health (MCBH) and Los Angeles County Department of Mental Health (LACDMH) are two of the participating members of the JPA. CalMHSA, MCBH and LACDMH are working collaboratively to solicit responses to meet a need initially for Monterey County and Los Angeles County.

This Request for Proposal is intended to solicit interested parties with the ability and capacity to perform the services requested, with the intent to award a contract to the selected entity. However, there is no guarantee of a contract, as we are facing unprecedented times which could dictate otherwise for CalMHSA's participating members.


Primary Problem

The primary problem being addressed by this project is the demand for mental health services outpacing the capacity of the mental health services system to appropriately screen and refer these individuals to treatment. MCBH, who is the originator of this project, organizes its "Systems of Care" in three areas: Adult services, Children's services and ACCESS services. Their ACCESS System of Care includes gateway early intervention services, including assessment and referrals, for individuals expressing symptoms of mental illness. The demand for services in ACCESS programs has seen a significant increase in recent years, with the number of clients served over the three-year period from FY2015-17 increasing by more than 100%, from 2,521 to 5,087. Meanwhile, the level of staff capable of responding to these community needs has remained relatively unchanged. The MCBH community planning processes have also revealed both a lack of knowledge in the community about available mental health services and a persistent stigma associated with mental health issues, particularly among Latino communities. MCBH believes demand for ACCESS services will continue to increase over time. Additional counties, including Los Angeles County, are experiencing similar challenges.

Several mobile applications that promote mental health and wellness have entered the market space in recent years. However, a thorough scan of available products has only found two varieties of application functionality. The first is to provide guided meditations. The second is to provide the user an ability to log and rate their emotional state. No applications were discovered that have the functionality to screen for a broad spectrum of mental health disorders ranging from depression to schizophrenia, nor were any capable of providing MCBH or LACDMH referral resources. To better meet the increased demand for services, MCBH and LACDMH have proposed the development of a comprehensive web-based mental health assessment application that can screen for a broad spectrum of mental health disorders and refer individuals to the appropriate level of care within the local mental health system.

User Scenarios

The following user scenarios highlight the general user profile (including type of user and technical competency), the need or purpose of that user, and their desired result. These user scenarios are intended to highlight the end user characteristics and desires to be positively influenced by the target solution.

User Profile	Need	Desired Result
 <p>Description: Family Member/Friend of an Individual that Experiences a Mental Health Disorder</p> <p>Technical Competency: Medium (Difficulty in navigating new applications, but has good smartphone, tablet, and laptop navigation capabilities).</p>	<p>A family member/friend of an individual experiencing symptoms of a mental health disorder can pull up this application on their phone or computer and guide their loved one through the screening tool.</p>	<p>The individual (and their family member / friend) will be educated on the symptoms they are experiencing, associated risks and treatment options, and local resource information.</p>



Description: Individual entering Mental Health Clinic or taking assessment without support from others.

Technical Competency: Low (Difficulty in navigating new applications and lack of experience in smartphone, tablet, and laptop navigation capabilities).

An individual is entering a County mental health clinic for the first time or taking the assessment alone. As part of the check-in procedures, the individual is asked to complete the web-based screening tool on their phone (or provided tablet) to expedite and/or inform the clinical intake/assessment person, or to advise the individual of resource options.

The individual is “warmed up” to the clinical assessment process with exposure to mental health screening questions and subsequent results. Additionally, the clinician and individual can review the results in order to expedite the treatment plan by reducing redundancy with clinician intake procedures.



Description: Community Service Provider conducting outreach activities

Technical Competency: High (Fully capable in navigating new applications and in the use of smartphone, tablet, and laptop navigation).

A community service provider performing education and outreach activities can utilize this screening tool with clients/participants expressing urgent needs for services for themselves or their clients.

The community service provider is equipped with an education and referral tool to assist individuals in need, while the individual is educated on symptoms and local resources.

2 Purpose of RFP for Services

To better meet the increased demand for services, MCBH and LACDMH have proposed the development of a comprehensive web-based mental health assessment application that can screen for a broad spectrum of mental health disorders and refer individuals to the appropriate level of care within the local mental health services system. MCBH and LACDMH are soliciting responses to identify and select a vendor to design and develop an evidence-based assessment tool comprising a series of questions that provide the user with an assessment score in a variety of mental health categories. Following the assessment, the type and severity of mental health symptoms will be identified along with

corresponding treatment program options that best fit their needs. The tool will be developed around the core criteria of:

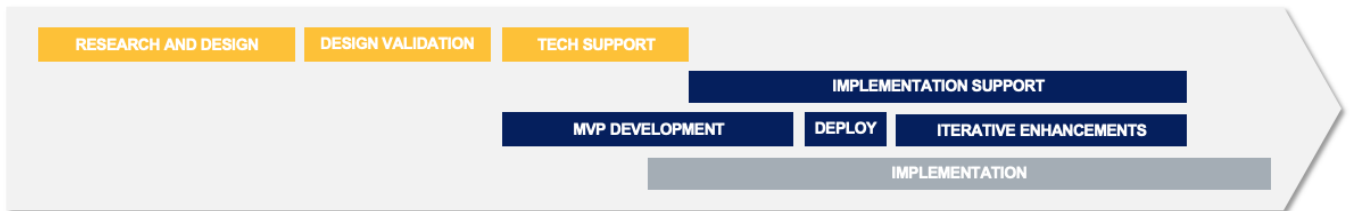
- ▶ Being able to screen for a broad range of disorders, from low risk with mild need to severe with urgent need.
- ▶ Being easily accessible for use by community-based providers to help individuals acquire treatment.
- ▶ Maintaining confidentiality standards.
- ▶ Working fluidly in Spanish.

Build upon current evidence-based screening tools with proven validity and utilize item response theory to minimize the number of questions and time involved in the assessment.

3 Project Scope Overview

This project will be executed across two (2) key phases; DESIGN and TECHNOLOGY for the vendor. The IMPLEMENTATION phase will be a multi-organization effort coordinated at CaIMHSA in conjunction with the Design and Development phases. There is a Scope of Work for each Design and Technology phase. A proposing firm must propose for the Scope of Work for both phases.

Example 1: Project Scope



3.1 Design Scope of Work

This Scope of Work will rely on best practice knowledge of research-based tools for mental health diagnosis. The goal of this phase is to design a sound and effective self-



assessment that an individual can take on their own, that will direct the consumer to additional resources and options based on the conclusions drawn from the assessment. This screening tool must contain business rules and question trees, guiding the user to answer questions relevant to them based on indicators. The vendor will include clinical and design subject matter experts.

The screening tool must meet the following requirements:

1. Screening tool with questions and answers drawn from existing best-practice and standard behavioral health assessment tools
2. Leverage non-proprietary open source tools in combination with adjustments as needed
3. Avoid duplication of questions if multiple tools are leveraged
4. Lead to possible condition identification in the following areas (at minimum):
 - a. Depression
 - b. Bipolar Disorder
 - c. Schizophrenia
 - d. Psychosis
 - e. PTSD
 - f. Anxiety Disorders
 - g. Substance abuse disorders
5. Be written in English and Spanish
6. Result in recommendations for appropriate local mental health resource information.
7. Result in descriptions of the possible condition with informative information
8. Require a User Agreement to be acknowledged by end Conduct Research

The services under this Scope of Work must include the following components of developing this tool:

1. Research
2. Design
3. Evaluation and Refinement

Deliverables

#	Deliverable
1	Project Plan & Schedule
2	Conduct Research
3	Functional Design Document
4	Testing Plan
5	Training Materials

The scope of services is to design a screening tool that allows individuals to take self-assessment, that will lead to a possible condition identification and make soft referrals to supporting agencies within Monterey County and Los Angeles County. The Scope of Services is to involve the following key tasks:

3.1.1 Deliverable 1 - Develop Project Plan & Schedule

- a. Plan should include plan for each design key project task, phase, and deliverable
- b. Plan should include a design phase project schedule, work breakdown structure, resources, risk management plan, quality plan, change management plan, and project escalation path for the design phase of the project.

3.1.2 Deliverable 2 - Conduct Research

- a. Research should include analysis of existing tools, studies of self-assessments, as well as research and interviews of stakeholders and County staff in coordination with CalMHSA

3.1.3 Deliverable 3 - Functional Design Document

- a. Create a design document in collaboration with the Technology Services Provider to outline relationships between functionality and design requirements including workflows through the screening process
- b. As part of this proposal submittal, provider is to submit a range of time which the assessment tool is estimated to be completed by the user. For example: "The full assessment tool is estimated to take between x minutes (minimum) and y minutes (maximum) to complete". Consideration should be made to design an assessment tool that is extensive enough to deliver an effective outcome, but not so exhaustive that users fail to complete it due to an excessively lengthy process. Please provide an estimation of time it would take an end-user to complete the assessment.

3.1.4 Deliverable 5 - Training Materials

- a. A cohort of CalMHSA, County staff and community-based service providers will be trained in the use of the tool. Similar user-testing may take place in Los Angeles as well. These trained individuals will then pilot screenings in the field, using the application with a small number of clients to ensure its applicability in their local communities, and assess functionality and user experience. The goals of the Evaluation Phase will include:
 - Determine if this screening tool accurately gauges type and severity of mental illness.
 - Determine if this application provides meaningful and accurate referral connections to the appropriate service / resource as efficiently as possible.
 - Assess whether this screening tool reduces the hours and cost associated with in-person assessments.
 - Assess whether individuals (staff, community provider, peer, etc.) using this application to assist a person in need find this application useful for connecting that person to resources.

- Assess the impact the implementation of this application has on the total volume of clients entering services including its effect on the demographics of clients served.

The evaluation phase will include both steps for validation and refinement as identified below:

1. Validation
 - a. Validation of the tool should involve dissemination of the screening tool to Monterey and Los Angeles residents and staff
 - b. Monterey and Los Angeles staff engage with local Community Based Organizations to assist with the dissemination of the screening tool
 - c. The vendor shall create the validation plan
2. Refinement
 - a. Work collaboratively with CaIMHSA, Monterey and Los Angeles Counties to modify and refine the assessment tool after input has been received.
 - b. The vendor shall participate in and facilitate the refinement plan

3.2 Technology Scope of Work

This phase will rely on a team of technologists to build or configure a mobile compatible web-based questionnaire screening tool which results in a possible condition and soft referrals based on business rules and information as developed in Phase 1.



Vendors should describe the delivery model along with the advantages. Delivery models considered for the required solution may include:

- ▶ Commercial off-the-shelf (COTS) software
- ▶ Custom built application
- ▶ Open-source software (all models)
- ▶ Managed services/hosted

The output of this scope of work must include a solution that:

1. Is a responsive web design with the ability to adapt easily across all devices (i.e. desktop, laptop, mobile, etc.)
2. Is on cloud-based infrastructure within cloud instances
3. Is compliant with HIPAA, PHI, PII and other modern security standards including being compliant with FedRAMP Medium standards to include a third-party assessment of the security standards to ensure compliance with these standards
4. Provides the ability to function consistently across multiple browsers (i.e. Edge, Chrome, Safari)

5. Uses business requirements and business-rules to drive functionality as defined by the Design Scope of Services
6. Captures all assessments and any other required data as identified from the section above (Design Scope of Work)
7. Does not require individual licensing fees
8. Supports multiple languages (i.e. Spanish and English) as identified by participating counties
9. Is intuitive and user friendly
10. Identifies possible condition(s) as defined by the Design Scope of Services
11. Provides the capability to enter, maintain and display local service providers as defined by the Design Scope of Services
12. Complies with ADA and WGAG v2.x or latest
13. Seamlessly scalable to accommodate future growth
14. Supports standard APIs, interfaces, and communication protocols for enterprise application integration systems and/or web services integration to other applications (integration not in scope of this contract). This Scope of Work will not be used to capture consumer health data or to submit claims.
15. Allows individual counties to easily access their respective data for reporting and other business purposes
16. Supports administration of application (i.e. user access control, define user roles, security, maintain lookup tables, etc.)
17. Supports business intelligence and analytical tools

Deliverables

The services executed in this phase should be conducted in an Agile methodology. This phase will initiate before the screening tool has been developed and will require a team to implement screens and business rules. Development efforts in this phase will also require working closely with CaIMHSA, in collaboration with Monterey County and Los Angeles County to validate the look and feel of screens, needs for data security and management, and build a platform that could in the future integrate with Monterey and Los Angeles internal systems.

#	Technology Deliverables
1	Technical Documents
2	Application Landscape/Environments
3	Application Prototype
4	Test Strategy and Documents
5	Training Strategy and Documents

6	Production Deployment
7	Post-Go Live Support
8	Data Extracts
9	Status Reporting
10	System M&O

Development or configuration of the application in a Cloud environment using iterative development practices.

3.2.1 Deliverable 1 – Technical Documents

Technical documentation including architecture and code base referenced directly to functional requirements, as well as any hosting or maintenance needs.

Technical documents must include the following:

- Functional Design Document
- Technical Design Document
- Application/System Architecture Document
- Entity Relationship Diagram (ERD)
- Application Workflow
- Data Dictionary

Vendor team shall provide a technical design document, which includes the above listed documents.

Acceptance Criteria

The CaIMHSA will accept the completion of the Technical Document per the following acceptance criteria:

1. Business Requirements Document should list all the user stories and requirements and business rules in detail along with any future or enhancement requirements.
2. Technical Requirements document that comprehensively lists the technical details i.e. screen names, field names, data types (numeric vs alphanumeric), etc. This document should also list all the security requirements to comply with various County, state and Federal security policies.
3. Technical Design document that includes user interfaces, wire frames, data flow diagrams, etc.
4. Application System Architecture document that includes Conceptual, Logical Architecture
5. Entity Relationship Diagram should include the table structures and their relationships and dependencies

6. Application workflow should include a detailed flow diagram of the various functions
7. Data Dictionary document that lists all the data fields and their attributes
8. The design document should also include any designs for features not-yet developed, including the relevant Epics, Features, and User Stories.

3.2.2 Deliverable 2 - Application Landscape/Environments

The project should provide the standard application code development/maintenance landscape i.e. Development, Test and Production environments.

Note on Test Environment: Vendor shall provide a test environment specific to the County so that county staff and Peers can test configurations and feature development in a manner that reflects their Production Environment.

Acceptance Criteria

1. A Test Environment that mirrors the Production Environment, but also includes county specific configurations that is accessible through a County Code.
2. The Test Environment should be completely separate from the Production Environment. There should be no way for a user in the Test Environment to be transferred to the Production Environment and vice versa.

3.2.3 Deliverable 3- Application Prototype

The vendor shall develop a working functional prototype of the end state application to be approved by the CalMHSA, Monterey and Los Angeles teams.

3.2.4 Deliverable 4 - Test Strategy and Documents

The vendor shall provide an overall test strategy document along with the following documents:

- Functional Testing Document and test scripts
- Technical testing document and test scripts
- User Acceptance testing document and test scripts
- Integration testing document (if needed)
- Regression testing document (if needed)

The Vendor team shall conduct testing on all developed features, bug fixes, and configurations, and resolve all issues, before code changes are deployed to County test environment. The Vendor team shall report to the CalMHSA Project Manager findings from testing on a regular basis.

UAT Entry Criteria

1. Vendor notifies CalMHSA of any development work performed outside of the Tech Suite that affects county configured environments. (During Sprint Planning)



2. Automated and Manual testing report provided by Vendor
3. Release notes have been provided to CaIMHSA by Vendor
4. New features and defect fixes have been migrated to the Test Environment

Acceptance Criteria

1. Any feature developed in the Test Environment pass Regression Testing and User Acceptance Testing prior to being able to deploy into the Production Environment
2. All identified bugs are shared with CaIMHSA and ultimately resolved by provider
3. CaIMHSA and County Sign-Off on items that pass User Acceptance Testing prior to deployment to the Production Environment

3.2.5 Deliverable 5 - Training Strategy and Documents

The vendor shall provide a detailed training strategy document (i.e. train the trainer, on-site/classroom training, etc.) along with the necessary training materials - Administrator Guides, User Guides, Cheat Sheet, etc. The vendor shall conduct the necessary training as outlined in the training strategy document.

3.2.6 Deliverable 6 - Production Deployment

The vendor shall deploy and configure the application with agreed upon functionality (including any bug fixes and enhancements) in production environment and make it available for production use.

Acceptance Criteria

The CaIMHSA will accept the completion of this deliverable with the completion of the following conditions:

1. Working and stable Production Environment is accessible by County with county code
2. Vendor will not push changes to Production that also affect County configured environments without prior approval
3. Production Environment contains all code approved by CaIMHSA from Testing Environment for MVP & Configuration needs
4. Production Environment reflects approved Configuration
5. CaIMHSA Sign-Off on Production Environment

3.2.7 Deliverable 7 - Post Go-Live Support

The vendor shall provide technical and functional support for 180 days after full production rollout of the application.

3.2.8 Deliverable 8 - Data Extracts

Vendor shall provide the county with periodic data extracts which can be used to support the evaluation of the effectiveness and accuracy of the tool. Data extracts must be part of the product used for testing so that the Design Vendor can assess the effectiveness of the solution. Data extracts must also be available post testing phase and during Go Live so that the system can be continuously evaluated.

Acceptance Criteria

1. Reports will be continually accessible to CaIMHSA, County and Design Vendor for evaluation purposes.

3.2.9 Deliverable 9 – Status Reporting

Vendor shall provide the following deliverables per contract requirements:

1. Mechanism for clients to obtain accounting of disclosures of Personally Identifiable Information (PII)
2. Outcome dashboard*
3. Quarterly Status of Deliverables report*
4. Annual Status of Deliverables report*

*These items are to be maintained and reviewed on an ongoing basis.

3.2.10 Deliverable 10 – Maintenance & Operations

This section outlines expectations of the Vendor team to support and maintain a working environment for Vendor users. All features must be maintained to continue meeting acceptance criteria. It is required that CaIMHSA will be the sole owner of the application in its Help@Hand form without recurring licensing fees.

Vendor team shall also provide a platform maintenance fee structure for ongoing rollout after MVP (e.g. by bands of users; by number of growth paths completed, etc.).

4 Agreement Terms

The Agreement will be for one year, and is subject to fund availability. If it is determined funds are no longer available, the Agreement may be terminated without cause or penalties.

The Agreement shall reflect a deliverable based payment structure not to exceed \$2.1 million. Respondents are asked to provide a detailed estimate of scope and cost necessary to achieve the goals detailed in the Scope of Work of the Technology development component.

The resulting Agreement will not take effect until fully executed by all parties and all insurance requirements have been met.

5 Response Contents

The following response components are required as outlined below. CalMHSA is not responsible for costs associated with the development of proposals nor shipping or delivery of such.

5.1 Response Contents – General

Please submit the following components as part of your response:

1. Cover Letter (limit 1 page)
2. Background of organization
 - a. Describe how your organization is equipped to meet the needs as identified in this Scope of Work and provide three examples of prior work that is similar in scope and complexity to the items outlined in this Scope of Work (limit 4 pages)
 - b. Executive Summary of proposed team and organizational structure, including all required key positions and any additional proposed positions (limit 6 pages)
 - c. Resumes
 - i. Design Staff
 - ii. Technology Staff
 - iii. Any Additional Staff
 - d. Understanding and Approach (limit 30 pages)
3. The vendor must propose a project management tool that will be accessible by CalMHSA and County staff
4. Cost Proposal
 - a. The vendor must download and submit a complete “Cost Worksheet” excel file found in Bonfire under “Files.”
5. Conflict of Interest Policy
 - a. The vendor must download and submit a fully executed “Conflict of Interest Policy.” This document can be found in Bonfire under “Files.”
6. Proposal Submittal Letter
 - a. The vendor must download and submit a fully executed “Proposal Submittal Letter” on their letterhead. This document can be found in Bonfire under “Files.”

5.2 Response Contents - Design

1. Proposed Team
 - a. Identify qualifications of resources for the following key roles
 - i. Project Manager
 - ii. Lead Researchers
 - iii. Identify any additional roles as necessary to complete the Scope of Work

- iv. Include resumes for each proposed team member
- 2. Approach to Scope of Work
 - a. Outline approach for conducting all activities related to the Scope of Work
 - b. For each task, identify key activities, milestones, deliverables, and work plan
 - c. Describe process for maintaining quality of deliverables
 - d. As part of this proposal submittal, provider is to submit a range of time which the assessment tool is estimated to be completed by the user. For example: “The full assessment tool is estimated to take between x minutes (minimum) and y minutes (maximum) to complete”. Consideration should be made to design an assessment tool that is extensive enough to deliver an effective outcome, but not so exhaustive that users fail to complete it due to an excessively lengthy process.
- 3. Cost Proposal
 - a. Outline each proposed resource, estimated hours per task, and rate used to calculate estimated cost
 - b. Define total proposed cost
 - c. Contract shall be paid on deliverables
 - d. Cost proposal details must be submitted on the Cost Worksheet (Exhibit 1)

5.3 Response Contents - Technology

- 1. Proposed Team
 - a. Identify qualifications of resources for the following key roles
 - i. Development Manager / Scrum Master
 - ii. Lead Developer
 - iii. Developer
 - iv. Identify any additional roles as necessary to complete the Scope of Work
 - v. Include resumes for each proposed team member
- 2. Approach to Scope of Work
 - a. Outline Agile development approach for conducting all activities related to the Scope of Work
 - b. For each task, identify key activities, milestones, deliverables, assumptions, and work plan not to exceed 15 months for the Design and Development phases
 - c. Describe process for maintaining quality of deliverables
- 3. Cost Proposal - Services
 - a. Outline each proposed resource, per the Cost Worksheet provided in Exhibit 1.
 - b. Define total proposed cost
- 4. Cost Proposal - Materials
 - a. Outline the cost to CaIMHSA for the environment and other development costs
- 5. Cost Proposal – Maintenance and Operations – 1 year
 - a. Outline the approach to Maintenance and Operations for 1 year to begin directly after implementation of the system on the first day that the system goes live
 - b. 1 year of Maintenance and Operations to be included in the overall project and cost
 - c. Include details of staff, services, and materials and platform maintenance costs

6 Roles and Responsibilities

This outlines the roles and responsibilities for each phase of the project.

6.1 Design Services

1. Provide overall project management and oversight to the project
2. Create and delivery monthly status reports
3. Facilitate weekly Status meetings and Daily Standups
4. Provide a path for escalation of issues
5. Facilitate and organize meetings with CaIMHSA, MCBH, and LACDMH
6. Review deliverables for quality before submission to CaIMHSA, MCBH, and LACDMH
7. Create and document survey questions and business rules
8. Document and identify source and rationale for specific questions and logic implemented
9. Work collaboratively with CaIMHSA, MCHB, LACDMH, and Technology Vendor throughout the design and validation process
10. Communicate any schedule delays, risks, and mitigation strategies throughout the project
11. Report to the CaIMHSA project manager and the MCBH and LACDMH project managers
12. Maintain compliance with research process regulations and engagement with people for the evaluation phase
13. Work collaboratively with all teams

The vendor must utilize an actively licensed psychiatrist as part of the Design team

6.2 Technology Services

1. Communication of anticipated or unanticipated risks, delays to the CaIMHSA Project Manager
2. Engaging in meetings with CaIMHSA and County staff including Daily Standups for the purposes of presenting product demos, validating requirements, assist with design decisions, and general project coordination
3. Establishing clear validation of product and configuration requests
4. Execution of all testing and regression testing to ensure product changes, enhancements, bug fixes, and configurations are developed in accordance with acceptance criteria and do not create new defects
5. Communication and resolution of major faults identified in Production
6. Communication and resolution of down time, blocking issues, and incidents
7. Monitoring of application performance
8. Application security and HIPAA compliance
9. Accessibility and ADA Compliance
10. Spanish and English Language processing
11. Monitoring and maintenance of SLAs

12. Completion of all deliverables identified in the above sections
13. Coordinate meetings and requests through CalMHSA Project Manager
14. Responsive to CalMHSA requests in a timely manner
15. Provide data as needed to Evaluator as related to assessment of product use
16. Provide a solution to support assessment of different types of users; users who were marketed to in different areas, with different materials, or different target populations

6.3 Counties of Monterey (MCBH) and Los Angeles (LACDMH)

1. Provide County specific clarification and direction
2. Provide final sign-off of development iterations
3. Participate and sign-off on all primary testing components per the proposed testing and approval methodology

6.4 CalMHSA

The CalMHSA as the contract holder, takes responsibility for the following key components:

1. Identify a stakeholder / sponsor individual who can provide “Sign-Off” and make key project decisions
2. Provide a staff who will fill the role of the Product Owner (Voice of the Customer), provide acceptance criteria and accept deliverables
3. Identify a project working team to provide feedback and work with vendor teams
4. Participate in daily standup meetings
5. Coordinate through CalMHSA for vendor requests
6. Participate in testing and provide staff to conduct testing when code is deployed to the test environment
7. Review deliverables and provide feedback in a timely manner
8. Provide overall management of Scope, Timeline and Deliverables
9. Coordinate meetings, work sessions, risks, and documentation
10. Facilitate project decisions with County
11. Provide an escalation path for MCBH and LACDMH
12. Complete User Acceptance Testing (UAT)

7 Submission Instructions and Requirements

7.1 Proposal Timeline

EVENT	Key Dates
RFP Issued	January 11, 2021
RFP Questions Due	January 22 5:00pm PST
Bidders Conference	January 28 9:00am PST
RFP Questions Answered	February 4 5:00pm PST
Deadline for Intent to Bid*	February 8, 11:59 pm PST
Deadline for Proposals to be Submitted	February 18 5:00pm PST
Application Review	Feb 19 –Mar4, 2021

*To meet the Deadline for Intent to Bid requirements, potential vendors must check the “intent to bid” box within the Bonfire Portal. Vendors will not be able to submit proposals if this box is not checked by the deadline.

7.2 Submittal Address

All Submissions must be submitted electronically using CalMHSA’s e-Procurement Portal:
<https://calmhsa.bonfirehub.com/>.

7.3 RFP Questions and Clarifications

All questions and requests must be submitted through CalMHSA’s e-Procurement Portal at: <https://calmhsa.bonfirehub.com/>. The deadline to submit questions for this RFP is January 22, 2021, 5:00 pm PST. The FAQ responding to the questions will be posted on February 4, 2021, 5:00 pm PST at <https://calmhsa.bonfirehub.com/> and to the CalMHSA website at www.calmhsa.org.

To ensure all parties have access to the same information at the same time, except as stated below, CalMHSA will NOT respond to questions as they are received and will not accept telephonic questions. CalMHSA will not send out emails following the posting of the FAQ. It is the sole responsibility of the proposer to refer to the FAQs, which will be posted on CalMHSA’s e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

If a Proposer is unable to submit questions via the Bonfire e-Procurement Portal, the Proposer must provide CalMHSA with an email justification outlining why the Proposer is unable to do so.

7.4 Bidders Conference

The Bidders Conference will be held on January 28, 2021 from 9:00AM-11:00 AM via Zoom. The meeting invite will be posted on the CalMHSA website and a link is included here. A recording of the Bidders Conference will be posted to the Bonfire Portal and CalMHSA website by January 29, 2021, 5:00 pm PST. The Bidders conference meeting details are as follows:

Join Zoom Meeting

<https://us02web.zoom.us/j/84828010341?pwd=RGlzb1M2M2FqV1lRMWJHc0VKQTBRdz09>

Meeting ID: 848 2801 0341

Passcode: 254088

Dial by your location

- +1 669 900 9128 US (San Jose)
- +1 346 248 7799 US (Houston)
- +1 253 215 8782 US (Tacoma)
- +1 301 715 8592 US (Washington D.C)
- +1 312 626 6799 US (Chicago)
- +1 646 558 8656 US (New York)

Find your local number: <https://us02web.zoom.us/u/kcO3tknpBt>

7.5 Withdraw

A proposer may withdraw or amend its proposal, but only before the Application Submittal Deadline, directly on CalMHSA's e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

7.6 Review of Applications

CalMHSA will receive all applications and review for completeness and adherence to the RFP rules stated in this document. Following the initial review, all qualified applications will be reviewed and scored by a review panel. The evaluation panel will conduct a fair and impartial evaluation of proposals received in response to this RFP.

The review panel is comprised of individuals with varied backgrounds, to include professional expertise, lived experience, personal knowledge, etc. Panelists' information will not be disclosed as a matter of confidentiality. CalMHSA is committed to ensuring the RFP review panel is representative of California's racial, ethnic, and cultural diversity.

Responses will be reviewed and scores awarded on the following best value considerations:

- Understanding and Approach – 40%
- Staffing and Organization – 30%
- Cost – 30%

7.7 Non-Collusion

A proposer shall not conspire, attempt to conspire, or commit any other act of collusion with any other interested party for the purpose of secretly, or otherwise establishing and understanding regarding rates or conditions to the solicitation that would bring about any unfair conditions.

7.8 Negotiations with Potential Proposers

Selection will not be based exclusively on price. CalMHSA reserves the right to negotiate with proposers who, in the opinion of the review panel, have submitted the best proposal in an attempt to reach an agreement. If no agreement is reached, CalMHSA may negotiate with other proposers or may choose to extend the proposal period. CalMHSA also reserves the right to meet with vendors to gather additional information. Additional information may include, but is not limited to, a demonstration of skills described in the proposal.

7.9 Protest Procedures

Protests must be received no later than five (5) business days after the Notice of Intent to Award is posted on the CalMHSA website. The sole basis for protest are that the award was (1) in violation of law, (2) in violation of the provisions of this RFP, or (3) in violation of CalMHSA's procurement process. All protests must be in writing and (1) state in detail each and every ground asserted for the protest, citing to the law, RFP provision, or particular provision of the procurement policy on which the protest is based; (2) explain why the error prevented the aggrieved organization from being awarded the contract; and (3) identify the remedy sought.

Within 14 days of receipt of any protest, CalMHSA's Executive Director will provide a written decision which shall be final upon transmission to the protesting party. If the Executive Director determines that the error identified by the protesting party has deprived that party from receiving the contract, the Executive Director may act to rectify the error, including but not limited to cancellation of the RFP or proposed contract, correction or other revision of the awarded contract, termination of an improperly awarded contract, or affirmation of an existing contract if the discovered defect is immaterial or the Executive Director determines that affirmation is in the best interest of CalMHSA.

7.10 Notice Regarding Public Records Act Request

CalMHSA is subject to the Ralph M. Brown Act and the California Public Records Act. All proposals received for this RFP are ultimately subject to public review; however, during the competitive bid process, all proposals will be kept confidential. Upon award and execution of contract by awardee(s), all proposals and supplemental information will be subject to public review, with the exception of those elements of a proposal which contain elements that are clearly marked as confidential or trade secrets. Any such designation should be accompanied by a brief explanation of the reason the information is non-public and protected from disclosure under California law. CalMHSA reserves the right to disregard such designations if they have been applied indiscriminately to non-protected information, and in no

event shall CalMHSA, its agents, representatives, consultants, directors, or officers be liable to a responding party for the intentional or inadvertent disclosure of all or a portion of a proposal submitted under this RFP, regardless of whether it was marked as confidential or trade secret.

Although the California Public Records Act allows certain confidential or trade secret information to be protected from disclosure, CalMHSA may not be in a position to establish that the information submitted is protected. If CalMHSA receives a request for public disclosure of all or any portion of a proposal that has been designated as exempt from disclosure, CalMHSA will use reasonable efforts to notify the responding party of the request and give such party an opportunity to assert, at its own expense, a claimed exception under the California Public Records Act or other applicable law within the time period specified in the notice issued by CalMHSA and allowed under the California Public Records Act.

7.11 Format of Proposal

Proposals must be submitted through CalMHSA's e-Procurement Portal at:
<https://CalMHSA.bonfirehub.com/>.

Internet Explorer 11, Microsoft Edge, Google Chrome, or Mozilla Firefox. Javascript must be enabled. Submissions by other methods will not be accepted. Browser cookies must be enabled. Respondents should contact Bonfire at Support@GoBonfire.com for technical questions related to submissions or visit Bonfire's help forum at:
<https://bonfirehub.zendesk.com/hc>.

Submission materials should be prepared in the file formats listed under Requested Information for this opportunity in the Bonfire Portal. The maximum upload file size is 1000 MB. Documents should not be embedded within uploaded files, as the embedded files will not be accessible or evaluated.

Submission documents must be in 12-point font in Times New Roman, single spaced.

Exhibits included herein by reference:

- | | |
|-----------|-----------------------------------|
| Exhibit 1 | Cost Worksheet |
| Exhibit 2 | CalMHSA 2020 Conflict of Interest |
| Exhibit 3 | Proposal Submittal Letter |