

2-Way Conversational Mobile Member Engagement Platform

Date of Issue: **October 4, 2022**

Applications must be received no later than: **2:00 p.m.
October 25, 2022**

Submit all RFP-related questions to: **Hans Leach**
hans.leach@phila.gov

**EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER:
WOMEN, MINORITY INDIVIDUALS AND PEOPLE WITH
DISABILITIES ARE ENCOURAGED TO RESPOND**

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1. INTRODUCTION

Community Behavioral Health (CBH), a Behavioral Health Managed Care Organization (BH-MCO) for the Pennsylvania Health Choices and Community Health Choices Program, is seeking a vendor to create and implement a Text message 2-way conversational engagement solution for Medicaid members. The goal is to utilize effective outreach to increase member activation through mobile health engagement to enhance CBH members' appropriate use of medications, and other health care services.

This document serves to describe the project for which we are requesting bids. It is the objective of CBH to approach this project iteratively; this staging approach is detailed in Section 2.3. We recognize that details described here may vary based on vendor recommendations or relevant field research. As such, vendors may suggest alternative approaches that promote an optimal solution.

2. GUIDE TO THIS RFP

This document conveys our vision for an Artificial Intelligence-based mobile outreach member engagement solution platform solution. We have included a background section about our organization and information about core solution requirements. To support vendors in developing a response to this RFP, a more detailed list and visual representation of CBH data systems will be made available upon request. If you would like to access this document, please contact Hans Leach (hans.leach@phila.gov). You will be required to complete a Non-Disclosure Agreement (NDA) prior to receiving access to this information.

Please read all sections so that your response is comprehensive.

2.1. Project Overview

CBH is a 501(c)(3) organization under contract to the City of Philadelphia, through the Department of Behavioral Health and Intellectual disAbility Services (DBHIDS), to administer the behavioral health Medicaid program for Philadelphia. CBH contracts with providers to deliver behavioral health treatment to members and is currently seeking a solution to automate its managed care processes and improve member clinical outcomes.

Consistent with its vision to support wellness, resiliency, and recovery for all Philadelphians, CBH is implementing a population health strategy with goals to improve health outcomes with a core component being member engagement and providing education and coaching support directly to members, whilst also receiving their input to shape future interventions.

Further, one key objective of implementing this platform is to deploy interventions with the aim of improving performance metrics, for National Council for Quality Assurance (NCQA) accreditation and state initiatives requiring continuous improvement. It is also critical that implementation has minimal impact on staff resource time for operational efficiency.

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CBH intends to use this platform to share information that may contain Protected Health Information (PHI) and Protected Individual Information (PII). Therefore, the platform should have appropriate compliance certifications that ensure HIPAA compliant management of all PHI and compliance with the Federal Communication Commission's Telephone Consumer Protection Act of 1991.

CBH has also recently joined the Health Share Exchange (HSX) in the region, as well as secured a population health platform. It is essential that the selected vendor has experience building compatibility features to such platforms, to ensure CBH is integrated in its approach of implement innovative technological platforms. CBH will consider both off-the-shelf products as well as custom development solutions.

Additionally, CBH intends to jointly partner with the selected vendor on opportunities to present findings of the program evaluation at conferences as well as submit for academic publication. To that end, the selected vendor will be familiar with standard policies and procedures related to synthesizing and dissemination findings and other research protocol set forth by the [City of Philadelphia Department of Public Health](#).

2.2. Overview of Functionality

The platform should have the following features:

1. 2-way conversation feature in order to capture and assess responses from members
2. Content development with reading and health literacy considerations
3. Conversation development that are customizable to CBH specific member population
4. Translation services in multiple languages
5. The use of behavioral data science to attain desired behavior changes
6. Access to on-demand member engagement reports by identified CBH leads
7. Support several data transfer methods including but not limited to SFTP, data capture application or cloud data platform
8. Ability to leverage SDOH datasets to tailor messaging

In addition to the above functionality requirements, CBH is looking for an engagement solution that:

1. Integrates with CBH data systems and supports interoperability with other systems
2. Supports use of behavioral health data
3. Allows for security auditing of access to data

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4. Is easy to use
5. Supports no-code artificial intelligence/machine learning (AI/ML) and is accessible to users with no coding knowledge
6. Includes health information exchange (HIE) interface capability
7. Is accommodating to adjustments in the prefabricated model and is extensible and customizable for future use
8. Publishes dynamic dashboards and reports

2.3. Project Staging

To achieve the above functionality, we anticipate that project staging and development will require an iterative process that meets the scope of work. As the project progresses, we anticipate that the software will need to be integrated with other software applications to support a seamless user experience. Therefore, systems integration capability is also a core requirement. For more information about CBH's existing information technology systems, please contact Hans Leach (hans.leach@phila.gov) per Section 2.

3. SCOPE OF WORK

3.1. Project Details

The overall objective of this RFP is to identify a qualified vendor who can develop and implement a 2-way conversational mobile platform to engage CBH members, as identified to address gaps in their treatment.

Please Note: ALL solutions should be designed as supportive and informational. Additionally, member engagement should be undergirded by motivational interviewing, cognitive behavioral therapy, interpersonal psychotherapy, and other proven techniques that will bring desired health behavior changes in this populations.

Below are five identified opportunities for the scope of the contract sought out through this RFP.

1. Provide CBH with an effective mobile outreach member engagement solution to improve its member utilization of schizophrenia treatment, and adherence to antipsychotic medication as defined by [the SAA HEDIS measure](#).
2. Provide CBH with an effective mobile outreach for members at an increased risk for developing depression during pregnancy and the postpartum period (perinatal period) and/or who are experiencing postpartum depression. Specifically, this outreach solution should be designed to be

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- supportive and informational to members receiving obstetrics and gynecology services associated with a birthing hospital.
3. Provide CBH with an effective mobile outreach member engagement solution to engage in productive dialogue with CBH members in need of TTY services who are deaf, hard-of-hearing, or have severe speech impairment. Accessibility to various languages is required.
 4. Provide CBH with effective mobile outreach for members aged 16 and older with an opiate use disorder diagnosis, prescribed buprenorphine within 30 days of mobile outreach solution kickoff. This intervention targets the pharmacotherapy for opioid use disorder (POD) HEDIS measure that assesses the percentage of opioid use disorder (OUD) pharmacotherapy treatment events among members age 16 and older and that continue 180 days (6 months). Encouraging pharmacotherapy is critical because individuals with OUD who engage in treatment with pharmacotherapy are less likely to exhibit withdrawal or craving symptoms and use illicit opioids, and are more likely to remain in treatment.^{4,5} Reference applicable [HEDIS measure](#).
 5. Provide CBH with effective mobile outreach for members aged 18 and older who have been discharged from acute psychiatric inpatient hospital, to improve member follow-up with behavioral health services after discharge, and prevent readmissions, as defined by the [FUH](#) and [REA](#) HEDIS measures.

The core components of the proposed solution must include:

1. Secure and effective program opt-in approaches
2. Reminders for desired behaviors (enroll, pick up medication, set appointments)
3. Barrier assessment (to identify drivers of member behaviors that oppose desired ones)
4. Assessment of members' satisfaction about their experience with the solution
5. Identification of other gaps in care not foreseen in solution development
6. Thorough evaluation of program outcomes and success as defined in partnership with CBH project leadership, to include engagement rates and performance trends

3.2. Project Management

We expect that the response will include details about the strategy the Applicant will use to set goals and produce regular reports on the progress of the project. We expect that the Applicant will designate one individual as a Project Manager and/or primary point of contact throughout the project.

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3.3. Target Timeline and Milestones

We expect that this software solution will be developed and implemented in phases. At a high level, we expect the following milestones to be reached by the associated due date:

Milestone	Due Date
First Solution Design and Development	March 2023 and iterative
User Experience and Site Testing & training	May 2023 and iterative
Software Go-Live	June 2023
Contract length	Multi-year contract(s) with yearly evaluations and option to renew until SOW presented in this RFP is completed

The selected Applicant will be evaluated for reaching the above milestones. Failure to meet these milestones may result in remedies that include rescinding the award for this RFP. Meeting the above milestones will also be contingent on CBH putting forth a good-faith effort to provide sufficient and necessary information, including technical support, to the selected Applicant. Applicants are welcome to propose an alternative timeline and should provide a detailed justification if selecting to do so.

Please Note: Contract renewals are subject to annual review by CBH to ensure that the contract terms are being met and that the deliverables are being completed within the expected timelines.

The submitted plan by applicant should also include a transition strategy for handling the following events as they may affect the requested product: (1) The Applicant becomes insolvent or bankrupt; (2) The Applicant’s business is acquired by another party.

3.4. User Experience (UX) Expertise and User Interface (UI)

We expect that the response will include details about optimization of the UX, including testing with focus groups. Proper UI standards should be in place. Overall UI should be aligned with CBH branding and security standards.

3.5. Front-End Coding

All front-end coding should follow Open Web Application Security Project (OWASP) security guidelines, with proper code review and security testing in place in addition to regular quality control measures.

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3.6. Security, Access, Encryption, and Authentication Requirements

We expect that the response will allow for CBH ownership of designating role-based access to this system. For example, designated CBH staff members may grant other CBH staff members access to the platform and subsequent permissions based on their role.

We expect that the response will discuss both the capability to exchange data via a CBH cloud-based data platform and link to third party software systems as defined by the functionality, security requirements, and specifications detailed above. Connection to the database layer should be flexible enough for future non-structured database utilization.

The software must be built and maintained in a secure environment. Access to the information behind the software should require a multi-factor authentication process to satisfy the assurance of privacy of the data. We expect that the software will be fully protected with no access allowed except for authenticated users. We expect security standards for the software and encryption at the data-in-transit level. We expect that the response includes a description of the Applicant's experience with secure Software Development Life Cycle (SDLC), including, but not limited to, coding standards for security and performance.

The Applicant should describe in detail how they implement best practices to maintain security, access, encryption, and authentication for their proposed solution.

3.7. Testing and Quality Assurance

We expect that the response will include a testing and Quality Assurance (QA) strategy.

3.8. Browser Support

We expect that the system will handle multiple browser-support options and the potential for mobile device access in the future.

3.9. Software Training

We expect that the design encompasses online aids to assist users, help functions that are context-specific, and mechanisms for assisting users in navigating the software. These help functions should be configurable by CBH staff. In addition, we expect that the proposed project approach includes several live staff training events.

3.10. Software Management

3.10.1. Ongoing Support and Development

We expect that the response will include a proposed plan for additions, changes, and potential new use cases that arise. The response should include a detailed pricing structure for this ongoing support and development.

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3.10.2. System Maintenance

We expect that the response will include a policy for responding to requests or inquiries from CBH. This policy should include an approximate timeline according to which issues will be resolved as well as an accompanying pricing structure. We also expect that the response will include schedule details about any system downtime required for updates.

3.10.3. Engagement Metrics

We expect that the response will include a proposed solution for measuring user engagement within the platform. These engagement metrics may include views, downloads, time reviewing messages, click through on educational links, or other metrics that may indicate utilization, adoption, and optimization of the solution by CBH members.

3.10.4. Algorithmic Bias Evaluation and Mitigation

We expect that the response will include a detailed plan to routinely identify, evaluate, mitigate, and summarize algorithmic biases, including those based on race, gender, sexuality, and ethnicity. CBH expects to collaborate with the selected vendor to operationalize this plan.

3.11. Understanding the Scope of Work and Requisite Experience

Responses will be evaluated on demonstrated comprehension of the above “Scope of Work,” including the following (not in order of importance):

1. Experience with equally technically challenging and complex projects
2. Detailed work plan with timelines that include the post-implementation period
3. Responsiveness to the functionality requirements
4. Realistic and detailed budgets with milestones
5. Willingness to agree to payments based on milestones
6. Significant familiarity with state and federal privacy and security standards
7. Experience working with Managed Care Organizations (MCO) and/or other insurance payors
8. Experience working with Medicaid populations
9. Experience using modern technology as best practice

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Please see Section 4.2.2., “Project Understanding and Proposed Scope of Work,” and Section 4.4.2., “Scoring by Review Committee,” for additional information relating to this section.

4. PROPOSAL FORMAT, CONTENT, AND SUBMISSION REQUIREMENTS; SELECTION PROCESS

4.1. Required Proposal Format

4.1.1. Proposal Cover Sheet

The cover sheet (see Attachment A) should be completed with the Applicant’s information and included as the first page of the proposal.

4.1.2. Table of Contents

A table of contents should be included as the second page of the proposal, with each section of the proposal included and with a page number for the first page of each section.

4.1.3. Format Requirements

Proposals must be prepared simply and economically, providing a straightforward, concise description of the Applicant’s ability to meet the requirements of the RFP. Each proposal must provide all the information detailed in this RFP using the format described below. The narrative portion of the proposal must be presented in print size of 12, using Times New Roman font, single spaced on 8.5” by 11” sheets of paper with minimum margins of 1”. For each section where it is required, the Applicant must fully answer all of the listed questions in the outline form in which they are presented in the RFP. Answers to each question must be numbered/lettered and correspond to the numbered/lettered questions in this RFP. Failure to number and letter the questions or to respond to all questions may result in the proposal being considered non-responsive. Each attachment, appendix, or addendum must reference the corresponding section or subsection number.

Applicants are required to limit their narrative responses to 25 single-spaced pages. This page limit includes Sections 4.2.1. to 4.2.5. below. There are no limitations for the cost proposal and operational documentation and requirements (Sections 4.2.6. and 4.2.7). If you have responded to a requirement in another part of your proposal, make reference to that section and do not repeat your response. Applicants whose narrative exceeds 25 single-spaced pages may have their proposals considered non-responsive and be disqualified.

4.2. Proposal Content

The proposal should follow the format below. Information should be complete and demonstrate that the consultant can perform the required work in a professional manner.

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4.2.1. Applicant Profile/Statement of Qualification/Relevant Experience

Provide company contact information, including how long you have been in business and the specific services you provide. Please provide a brief narrative description of the purpose, corporate status (profit or non-profit), and organizational structure of the company. Organizational charts may be used to support appropriate aspects of this narrative and may be included as an attachment to your proposal. Identify and briefly describe related work completed in the last three years. Describe only work related to the proposed effort and include any examples of similar work in governmental, non-profit, or human-services-related organizations. Include evidence of satisfactory and timely completion of similar work performed for past projects.

4.2.2. Project Understanding and Proposed Scope of Work

Prepare a brief introduction, including a demonstration of understanding of the scope and complexity of the required work. The Applicant should include a description of the software features offered based on the information provided in section 2.2, “Overview of Functionality.” Please provide a description of how the proposed services will be provided, including how the work will be developed, shared, and mutually agreed upon with CBH. Please include a description of each item identified in the scope of work section (see Section 3., “Scope of Work,” above) and describe creative solutions and alternative approaches where feasible.

4.2.3. Personnel

Identify key personnel who will be assigned to this project. Detail their experience in work related to the proposed assignment. Specify the Project Manager and/or individual who will serve as a contact person. Provide resumes and job descriptions for all individuals proposed to participate in the project. Provide copies of certifications of any individual whose job description requires a certification. In this section, also state the intention, if that is the case, to utilize subcontractors to perform any of the work for this project. For each subcontractor, provide the name and address of the subcontractor, a description of the work the subcontractor will provide, and whether the subcontractor is a minority-, woman-, or disabled-owned business.

4.2.4. References

Please include at least three references, with contact information, from organizations that have used your organization’s services in the past three years and have been customers for a minimum of 12 months.

4.2.5. Project Plan and Timeline

Provide a description of the project plan and timeline for the software solution being sought through this RFP. This project plan and timeline should include a support plan for the post-implementation period.

4.2.6. Cost Proposal

Please provide a cost proposal based upon your best understanding of the scope of the project and the services to be delivered. This cost proposal should include the total estimated cost for this project, itemized by the expected project milestones outlined in your proposal or in another comprehensive manner. This cost

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proposal should also include the provision of a detailed list of charges for services, including post-implementation system maintenance. The list of services should include at a minimum:

1. Hourly personnel rates for all staff assigned to this project, including post-implementation staff (e.g., database administrators)
2. Fees for subcontractors
3. Reimbursable rates for expenses such as printing, copies, etc.
4. Other miscellaneous costs and fees

Final rates will be determined in negotiations with the qualified Applicant after the proposal submissions have been reviewed and contract negotiations have begun. Although CBH may begin contract negotiations based on the submitted proposal, CBH reserves the right to have discussions with those Applicant(s) falling within a competitive range and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.

4.2.7. Operational Documentation and Requirements

Please make sure to include completed and signed (where applicable) attachments with your submission:

- ➔ Attachment A: [CBH Administrative RFP Response Cover Sheet](#)
- ➔ Attachment B: [City of Philadelphia Tax and Regulatory Status and Clearance Statement](#)
- ➔ Attachment C: [City of Philadelphia Disclosure Forms](#)
- ➔ Attachment D: [City of Philadelphia Disclosure of Litigation Form](#)
- ➔ Attachment E: [CBH Administrative Procurement Terms and Conditions/Acknowledgement Form](#)

Additionally, in this section, please include the following information, either within the section itself or by reference to an attachment to your proposal:

- ➔ Tax Identification Number
- ➔ Letter attesting that all required federal, state, and local taxes (including payroll taxes) for the past 12 months have been paid
- ➔ In the case of for-profit organizations, group, or individual practices, disclosure of any person or entity holding any shared ownership or controlling interest of 5% or more of the company

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- ➔ MBE/WBE/DSBE Status (for-profit Applicants)

4.3. Submission Process and Procurement Schedule

The anticipated procurement schedule is as follows:

<i>RFP Event</i>	<i>Deadline Date</i>
RFP Issued	October 4, 2022
Deadline to Submit Questions	October 11, 2022
Answers to Questions on Website	October 14, 2022
Application Submission Deadline	2:00 PM ET on October 25, 2022
Applicants Identified for Contract Negotiations	December 2, 2022

CBH reserves the right to modify the schedule as circumstances warrant.

Please Note: Due to office closures surrounding the COVID-19 public health emergency, only electronic submissions will be accepted for this RFP as described below.

This RFP is issued on September 26, 2022. To be considered for selection, all applications must be delivered to hans.leach@phila.gov **no later than 2:00 p.m. ET on October 25, 2022**. Submission requirements:

- ➔ Subject lines should say “CBH Mobile Member Health Engagement Platform RFP.” Applications submitted by any means other than email will not be accepted.
- ➔ Applicants must submit an electronic version of the application prepared as a PDF document; this submission will be considered the original and should include all signed documents noted in Section 4.2.7., “Operational Documentation and Requirements.”
- ➔ Applications submitted after the deadline date and time will be returned.
- ➔ The individual Applicant or an official of the submitting agency, authorized to bind the agency to all provisions noted in the application, must sign the cover sheet of the application (see Attachment A).

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4.4. Selection Process

An application review committee will review all responses to this RFP. Based on the criteria detailed below, the committee will make recommendations concerning the submissions that are best able to meet the goals of the RFP.

Submissions will be reviewed based upon the merits of the written response to the RFP as well as a technical demonstration of selected Applicants (See Section 4.4.2.1.).

Specific scoring criteria upon which the review will be based include the following:

4.4.1. Threshold Requirements

Threshold requirements provide a baseline for all proposals, which means they provide basic information that all Applicants must meet. Failure to meet all of these requirements may disqualify an Applicant from consideration through this RFP. Threshold requirements include timely submission of a complete application with all sections outlined in Section 3., “Scope of Work,” and in Section 4., “Proposal Format, Content, and Submission Requirements; Selection Process” completed.

Threshold requirements include having the requisite experience and qualifications to implement the program and being a vendor in good standing with the City and CBH.

Threshold requirements also include consideration of the Applicant’s financial status, including any potential delinquencies to the City and CBH. Proposals may be rejected if, in CBH’s judgment, the Applicant has failed to provide all information required by this RFP; has been delinquent or unfaithful in the performance of any contract with CBH or others; is delinquent, and has not made arrangements satisfactory to CBH with respect to the payment of City taxes or taxes collected by the City, or other indebtedness owed to the City or other taxing authorities; is not in compliance with regulatory codes applicable to Applicant; is financially or technically incapable; or is otherwise not a responsible Applicant.

As part of the Threshold Review, CBH will check each Applicant against all required Commonwealth and Federal exclusion lists to ensure that the Applicant or its principals are not excluded from receiving federal funds.

4.4.2. Scoring by Review Committee

Applicants that do not meet all the threshold requirements will have their proposals disqualified. Scoring will be based on both the written proposal and the technical demonstration. For Applicants meeting the threshold requirements, the scoring criteria upon which the review will be based are as follows:

- ➔ Demonstrated understanding of the project as indicated by a description of each item in the scope of work section

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- ➔ Appropriateness of proposed project approach, project plan, timeline and resource estimates, architectural design, and post-implementation strategy
- ➔ Demonstrated qualifications and relevant experience
- ➔ As stated in the cost proposal section, likelihood that the proposal will provide the best value compared to other submitted proposals

4.4.2.1. Technical Demonstrations

Applicants that meet all threshold requirements will also be required to record and submit a technical demonstration that complements their written proposal. The demonstration will be factored into the Applicant's overall score. Applicants meeting threshold requirements will be notified after this threshold review, and further guidance will be provided at that time.

4.4.3. MBE-/WBE-/DSBE-Owned and Local Businesses

Special consideration will be given for the following:

- ➔ Businesses owned and controlled by minorities, women, and disabled persons
- ➔ Philadelphia-based Applicants

4.4.4. Questions Relating to the RFP

Written requests for access to the CBH Data Systems documents must be submitted to Hans Leach at hans.leach@phila.gov. All questions concerning this RFP must be submitted in writing via email to Hans Leach at hans.leach@phila.gov by 5:00 p.m. on October 11, 2022. CBH will respond to questions it considers appropriate to the RFP and of interest to all Applicants, but reserves the right, in its discretion, not to respond to any question. Responses will be posted on the CBH website by October 14, 2022. Responses posted on this website become part of the RFP upon posting. CBH reserves the right, in its discretion, to revise responses to questions after posting by posting a modified response. No oral response to any Applicant question by any CBH employee or agent shall be binding on CBH or in any way considered to be a commitment by CBH.

Contact regarding this RFP with CBH or related staff other than the individual named above is not permitted, and failure to comply with this restriction could result in disqualification.