



Cultivating the Health of Our Communities

Wabanaki Public
Health & Wellness

Invitation to Bid

Request For Proposal – 2022-005

March 31, 2022

Dear Recipient,

Wabanaki Public Health and Wellness (WPHW) would like to extend this Invitation to Bid (ITB) for our recently posted Request for Proposal (RFP) 2022-005. Wabanaki Public Health and Wellness is seeking bids for Case Management Software for our Public Health caseworkers. You will find the key requirements of the software within this document and on our website [Procurement | Wabanaki Public Health and Wellness \(wabanakiphw.org\)](https://www.wabanakiphw.org/procurement). If you are interested, please email Jake Tauke, and I'll work to schedule a time to meet with a representative from your organization.

Sincerely,

Jacob Tauke
Procurement Team Lead
Wabanaki Public Health and Wellness
jtauke@wabanakiphw.org

PO Box 1356
Bangor, Maine 04402 USA
[Procurement | Wabanaki Public
Health and Wellness](https://www.wabanakiphw.org/procurement)
 [\(wabanakiphw.org\)](https://www.wabanakiphw.org)



I. DESCRIPTION OF THE DESIRED SERVICE

Our organization desires a social work case management software to meet the outlined key requirements. To ensure these essential requirements can be met, representatives from WPHW's departments will be present for a live demonstration of the proposed software, followed by a question-and-answer period.

II. Key Requirements

1. Data Collection

- a. An internal shared database of personal information gathered from those who called into our Careline Service. Personal data will be equivalent to electronic health records comprised of data such as; clinical information, assessments, demographic information,
- b. Data gathered will be primarily used by social workers to manage patient services and referrals, and to report program metrics to grantors.
- c. Database will contain Mental Health patient data, requiring separation from general healthcare data (primary care).
- d. Generate categorical data reports
- e. Document storage

2. Company User Interface

- a. Ability to flag individual cases for others to take action on. Notification/reminder system if action needs to be taken.
- b. Each case record must be visible and actionable to each service sector of WPHW (Careline, Job Placement, Youth Development, etc.) to ensure each case has a record of services provided by each service sector if applicable.



3. Easy input for client updates, notes – all stored in one place – ability to chronologically tell their stories and "go back" to previous notes
 - a. Client Progress Tracking
 - b. Goal setting
4. Client to Provider Interaction
 - a. The client can interact with the software to make, change, or schedule appointments add comments/requests that Provider can view and take action on.
 - b. Ability for client to enter their emergency contact information.
5. Demonstration and Training
 - a. Caseworkers must be present for a live demonstration of the software's capabilities to ensure the software meets their program-specific requirements.
 - b. Bidder must incorporate a detailed training schedule that caseworkers can attend to gain a comfortable understanding of the software's features.
6. Attachment's A and B are examples of the data typically gathered by WPHW staff.
7. I.T.
 - a. SAML Compatibility
 - b. Ability to be synced with similar software such as DocuSign, Outlook, and SharePoint.



Attachment A

**Wabanaki Public Health and Wellness
"The Wab" Peer Run Recovery Center
Annual Update**

Name: _____ Date of birth: _____

Address: _____ Phone: (____) _____

Emergency Contact: _____ Phone: (____) _____

Do you have any allergies? Yes() No () Any medical conditions we should be aware of? Yes() No()

If yes, please describe: _____

Our focus:

- Promote wellness and encourage healthy behaviors
- Provide a safe place for our community to go/" haven"
- Culturally congruent, offering Native American- teachings, spirituality, arts/crafts, etc
- Integrated with the community supports networks- to create and strengthen relationships
- Build awareness on various topics (ie: Wellbriety, nutrition, health)
- Available resources: phone, computer, pamphlets, community and tribal events
- A place to access intentional peer support
- A recovery oriented environment

Expectations for Participation:

- Participate drug and alcohol free
- Speak and behave in a kind, respectful, and appropriate manner
- Supervise and ensure safety of children at all times
- Be responsible for cleaning up after yourself
- Be relaxed in the room. No sleeping
- Keep speaker phones off. Keep phone conversations private



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- Limit phone and computer use to 60 minutes when others are in the room
- Prevent the spread of germs and illnesses. Please stay home if sick
- Respect the privacy of others

I understand that Wabanaki Public Health and Wellness Peer Run Recovery Program will keep my information confidential.

By signing below, I am confirming that I have reviewed the description and expectations of participation.

Signature: _____

Date: _____

Witness: _____

Date: _____

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Wabanaki Care Line Call Form

Please collect the following data when answering a care line call

* Required

1. Date of call: (Use calendar to enter date) *



Format: M/d/yyyy

2. Person completing this form: *

3. Time of call. (Enter time of day only)

4. Caller's name: *

5. Client ID: (Optional)

6. Caller's address: (For emergency use only)

7. Caller's phone / cell: (incase disconnected)

8. Is texting ok?

Yes

No

Other

9. Date of Birth (Please enter date only) *



Format: M/d/yyyy

10. Gender identity:

11. Which Tribe or First Nation are you a citizen of (Select all that apply)

- Houlton Band of Maliseet Indians
- Aroostook Band of Micmac
- Passamaquoddy - Sipayik (Pleasant Point)
- Passamaquoddy - Motahkomikuk - Indian Township
- Penobscot Nation
- Other Wabanaki Nation (use other below to identify)
- Not a Tribal citizen (use other below to identify)
-

Other

12. Is Caller in a safe place? (use other to comment)

- Yes
- No
-

Other

13. Risk of Harm

- Low
- Medium
- High
-

Other

14. Risk Comments: (include type of lethal means if applicable)

15. Is caller a person that: (Do not ask caller)

- Has serious mental health and substance use disorder (co-occurring)
- Has a less serious mental health issue (For example: mild anxiety or depression)
- Is a provider calling for support

Other

16. Who made this call:

- Person needing help

Other

17. Summary of call:

18. Referral:

Case management services

Dr. Mehl -Madrona Psychiatric

Staff clinician

Other

19. Disposition Plan: (Please include any referrals made)

20. Name of staff clinician client / caller was referred to:

21. Duration of call ***IN MINUTES: (120 mins, 45 mins)***

This content is neither created nor endorsed by Microsoft. The data you submit will be sent to the form owner.

 Microsoft Forms



III. DESCRIPTION OF THE PROCESS

- WPHW will publish the RFP publicly on its webpage and send the Proposal to companies believed to specialize in social work case management software.
- WPHW will answer bidders' questions related to this RFP during the dates provided in Section IV.
- Bidders will complete Appendix A to E within this document and submit them to the requestors' point of contact.
- WPHW will communicate with the selected Bidder through an award letter.
- WPHW will communicate with all non-selected bidders via a rejection letter entailing the bid selection justification.
- WPHW will send a contract to the awarded Bidder.

IV. SCHEDULED ACTIVITIES:

DATES	SCHEDULED ACTIVITY
03/31/2022	Publication of RFP on WPHW website.
03/31/2022 through 04/14/2022	Questions and Answers
04/21/2022 at 5:00 pm EST	Reception deadline for Proposals
04/22/2022	Evaluation of Bids.
04/25/2022	Notice of Award and Contract.
04/29/2022	Contract Start Date



V. KEY RFP EVENTS

A. Bidder Instructions

1. **General Instructions:** It is the responsibility of all Bidders and other interested parties to examine the entire RFP and to seek clarification, in writing, if they do not understand any information or instructions.
 - a. The Proposal shall be per the requirements outlined in this document and formatted per Appendix's A through E. Importantly; bidders may choose to use their document bid templates so long as the information requested is provided within the Bidder's selected documents.
 - b. **Services:** Provide a detailed live demonstration of the Desired Product listed in Sections I. and II. of this document.
 - c. **Cost of the Work:** The Cost of the Work proposal submitted on Appendix D, Cost Proposal Form, shall provide a set price, broken out into individual components as noted in Appendix D, includes all foreseeable work items required to deliver a complete and functional Service. Cost of Work is only subject to increase should a significant additive scope change occur, necessitating a Change Order and the prior approval of the Requestor.
 - d. **General Conditions:** The Bidder's Conditions and any standard service contracts shall be sent to the requestors' point of contact in addition to Appendix A through E.
 - e. **Change Orders:** The Cost of the Work line-item values are commensurately fixed through a process of refined scope definition and procurement commitments. As appropriate, to keep the cost of the Service scheduled values current, any changes or transfers shall be substantiated, accounted for by Change Order, and subject to the approval of both the awarded Bidder and the Requestor.



- f. Payment Procedures: Progress payments will be processed under the eventual Agreement between awarded Bidder and the Requestor
 - g. Bidders and other interested parties must use **Appendix E or a similarly formatted document** – "Submitted Questions Form"– to submit questions. The form is to be submitted as a Microsoft Word document.
 - h. The Submitted Questions Form must be submitted by email and received by the Procurement Team Lead as soon as possible but no later than the seven (7) business days before the reception deadline Proposals listed in Section IV.
 - i. Submitted Questions must include the RFP Number and Title in the subject line of the email. The Requestor assumes no liability for assuring accurate/complete/on-time email transmission and receipt.
2. **Question & Answer Summary:** Responses to all questions will be compiled in writing and posted on the following website no later than seven (3) business days before the Proposal due date: [Procurement | Wabanaki Public Health and Wellness \(wabanakiphw.org\)](#). It is the responsibility of all interested parties to go to this website to obtain a Question & Answer Summary copy. Only those answers issued in writing on this website will be considered binding.

B. Amendments

All amendments released concerning the RFP will also be posted on the following website [Procurement | Wabanaki Public Health and Wellness \(wabanakiphw.org\)](#). It is the responsibility of all interested parties to go to this website to obtain amendments. Only those amendments posted on this website are considered binding.



C. Submitting the Proposal

1. **Proposals Due:** Proposals must be received no later than 11:59 pm local time, on the reception deadline for Proposals listed in Section IV. Emails containing original proposal submissions, or any additional or revised proposal files received after the 11:59 pm deadline will be rejected without exception.
2. **Delivery Instructions:** Email proposal submissions are to be submitted to Wabanaki Public Health and Wellness Procurement Team Lead at jtauke@wabanakiphw.org

D. Scoring:

Proposals will be reviewed, and consensus scored based on the following criteria:

1. Company Experience and Personnel Qualifications.
2. Licenses, Insurance, and State Authorization document support.
3. Timeline of Project.
4. Competitive Price
5. Software's ability to meet all deliverables specified in Section's I and II.
6. The Requestor will select a Bidder based on the above requirements and reserves the right to negotiate services and prices.



E. Submitting

1. Only proposal submissions received by email will be considered. The Requestor assumes no liability for assuring accurate/complete email transmission and receipt.
2. Emails containing links to file sharing sites or online file repositories will not be accepted as submissions. Only email proposal submissions that have the actual requested files attached will be accepted.
3. Encrypted emails received which require opening attachments and logging into a proprietary system will not be accepted as submissions. Please check with your organization's Information Technology team to ensure that your security settings will not encrypt your proposal submission.
4. Bidders are to insert the following into the subject line of their email proposal submission: "RFP# 2022-005 Proposal Submission – [Bidder's Name]."
5. Bidder's proposal submissions are to be broken down into multiple files, with each file named as it is titled in bold below (Appendix A, B, C, etc.)

Company Contact:

Jacob Tauke
Wabanaki Public Health and Wellness
Procurement Team Lead
P.O. Box 1356
Bangor, Maine 04402
jtauke@wabanakiphw.org



APPENDIX A

RFP# 2022-005
PROPOSAL COVER PAGE
Case Management Software

Bidder's Organization Name:			
Chief Executive - Name/Title:			
Tel:		Email:	
Headquarters Street Address:			
Headquarters City/State/Zip:			
<i>(Provide the information requested below if different from above)</i>			
Lead Point of Contact for Proposal - Name/Title:			
Tel:		Email:	
Headquarters Street Address:			
Headquarters City/State/Zip:			

- This Proposal and the pricing structure contained herein will remain firm for a period of 180 days (about 6 months) from the date and time of the bid opening.
- No personnel currently employed by the Department, or any other State agency participated, either directly or indirectly, in any activities relating to the preparation of the Bidder's Proposal.
- No attempt has been made, or will be made, by the Bidder to induce any other person or firm to submit or not to submit a proposal.
- The above-named organization is the legal entity entering into the resulting contract with the Requestor if they are awarded the contract.
- The undersigned is authorized to enter contractual obligations on behalf of the above-named organization.



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To the best of my knowledge, all information provided in the enclosed Proposal, both programmatic and financial, is complete and accurate at the time of submission.

Name (Print):	Title:
Authorized Signature:	Date:

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APPENDIX B

RFP# 2022-005
DEBARMENT, PERFORMANCE, and NON-COLLUSION CERTIFICATION
Case Management Software

Bidder's Organization Name:

By signing this document, I certify to the best of my knowledge and belief that the organization, its principals, and any subcontractors named in this Proposal:

- a. Are not presently debarred, suspended, proposed for debarment, and declared ineligible or voluntarily excluded from bidding or working on contracts issued by any governmental agency.*
- b. Have not within three years of submitting the Proposal for this contract been convicted of or had a civil judgment rendered against them for:*
 - i. Fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or contract.*
 - ii. Violating Federal or State antitrust statutes or committing embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property.*
 - iii. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or Local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and*
 - iv. Have not within a three (3) year period preceding this Proposal had one or more federal, state, or local government transactions terminated for cause or default.*



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c. Have not entered a prior understanding, Agreement, or connection with any corporation, firm, or person submitting a response for the same materials, supplies, equipment, or services, and this Proposal is in all respects fair and without collusion or fraud. The above-mentioned entities understand and agree that collusive bidding is a violation of state and federal law and can result in fines, prison sentences, and civil damage awards.

Name (Print):	Title:
Authorized Signature:	Date:

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APPENDIX C

QUALIFICATIONS and EXPERIENCE FORM

RFP# 2022-005

Case Management Software

Bidder's Organization Name:	
------------------------------------	--

Present a brief statement of qualifications. Describe the history of the Bidder's organization, especially regarding skills pertinent to the specific work required by the RFP and any special or unique characteristics of the organization which would make it especially qualified to perform the required work activities. You may expand this form and use additional pages to provide this information.

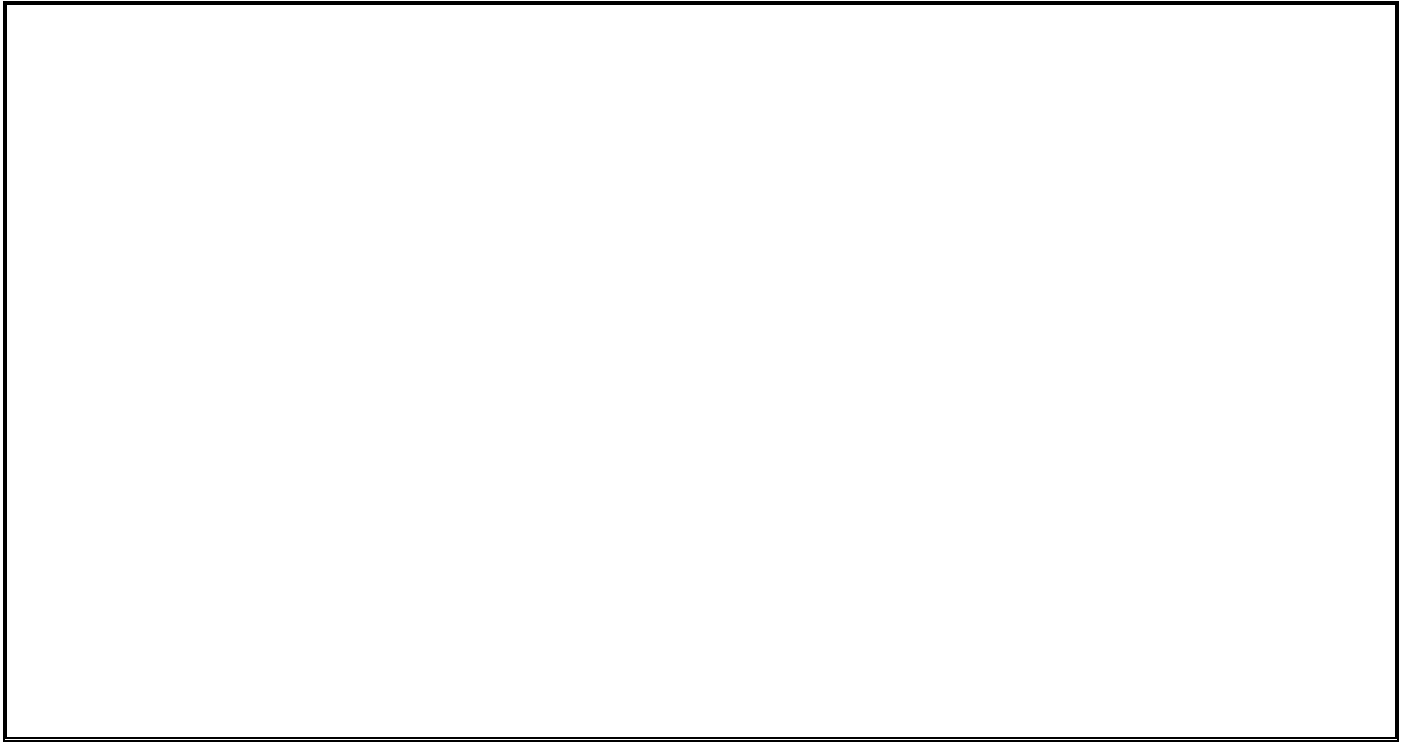
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Provide a description of projects that occurred within the past five years that reflect the experience and expertise needed to perform the functions described in Section I. of the RFP. For each of the project examples provided, a contact person from the client organization involved should be listed, along with that person's telephone number and email address. Please note that contract history with the State of Maine, whether positive or negative, may be considered in rating proposals even if not provided by the Bidder.

If the Bidder has not provided similar services, note this, and describe experience with projects that highlight the Bidder's general capabilities.

Project One	
Client Name:	
Client Contact Person:	
Telephone:	
Email:	
Brief Description of Project	



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Project Two	
Client Name:	
Client Contact Person:	
Telephone:	
Email:	
Brief Description of Project	

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Project Three	
Client Name:	
Client Contact Person:	
Telephone:	
Email:	
Brief Description of Project	

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APPENDIX D

COST PROPOSAL FORM

RFP# 2022-005

Case Management Software

Bidder's Organization Name:	
Annual Service Cost	
Staff Trainings	
(List additional line items if needed)	
Proposed Cost:	\$

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APPENDIX E

SUBMITTED QUESTIONS FORM
RFP# 2022-005
Case Management Software

Organization Name:	
---------------------------	--

RFP Section & Page Number	Question

** If a question is not related to any section of the RFP, state "N/A" under "RFP Section & Page Number". ** Add additional rows, if necessary.*

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