Request for Proposal (RFP)

Subject Matter Expertise: Training and Executive Workforce Development for Clinical Leaders of Federally Qualified Health Centers (FQHC)

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RFP Released: August 21, 2017
Proposals Due: September 6, 2017

Points of Contact:
Training and Technical Assistance Department, NACHC
Phone (301) 347-0400
Neha Desai (NDesai@nachc.org) or Gina Capra (GCapra@nachc.org)
**Purpose**

The NACHC Training and Technical Assistance Program (TTA) assists existing and potential health centers in addressing operational demands while sustaining their health care access mission, a community governance model and a commitment to cultural and linguistic competence in healthcare delivery to underserved and vulnerable populations. Through a diverse cadre of subject matter experts and increasingly diverse delivery venues, the NACHC TTA Program is highly utilized and must be well prepared to respond to emerging healthcare delivery issues. Specifically, NACHC maintains subject matter experts and a professional training cadre to provide health center professionals with quality instruction and technical assistance resources based in adult learning principles, advanced instructional design and an understanding and application of technology to enhance TTA delivery. The U.S. Health Resources and Services Administration (HRSA) Bureau of Primary Health Care (BPHC) provides resource support to NACHC to improve health center operational and clinical outcomes through the provision of coordinated, collaborative TTA.

**Organization Overview**

The National Association of Community Health Centers (NACHC) was founded in 1971 to “promote the provision of high quality, comprehensive and affordable health care that is coordinated, culturally and linguistically competent, and community directed for all medically underserved populations.”

NACHC:

- Serves as the leading national advocacy organization in support of community-based health centers and the expansion of health care access for the medically underserved and uninsured.
- Conducts research and analysis that informs both the public and private sectors about the work of health centers, their value to the American health care system and the overall health of the nation’s people and communities – both in terms of costs and health care outcomes.
- Provides training, leadership development and technical assistance to support and strengthen health center operations and governance.
- Develops alliances and partnerships with the public and private sectors to build stronger and healthier communities.

**RFP Services Desired**

Through this Request for Proposal (RFP), NACHC is seeking specific subject matter expertise in core competency development, curriculum refinement, and training delivery on clinical operations and clinical quality improvement for health center professionals who administer health care services at Federally Qualified Health Centers (FQHC), also known as the Health Center Program.

NACHC seeks experienced subject matter experts and innovative trainers significantly familiar with Section 330 of the Public Health Service Act and are experienced in the clinical operations and executive leadership implications of the Health Center Program Requirements.

Time period for services is September 15, 2017 through July 15, 2018.

For the content areas listed below, please choose the specific opportunity for which you would like to be considered.

**Content Area – Clinical Quality Core Competencies and Mapping**

**Scope of Work:** Selected vendor(s) will provide technical expertise for clinical leadership core competencies for Clinical Directors and Quality Improvement Coaches, including mapping of training and technical resources, vetting training resources to meet HRSA/BPHC strategies and goals and refinement of core competences.
Selected vendor(s) will need to have at least 10 years national level experience in developing, delivering on quality improvement for health centers; 10 years or more working in a health center implementing quality improvement; and 2-3 years’ experience in developing core competencies for the FQHC environment;

**Deliverables:**

- Monthly, virtual facilitation of the National Core Competencies Advisory Group, no more than 4 hours monthly.
- Mapping of professional development plans for Quality Improvement Coordinators and Clinical Directors who work in health centers.
- In partnership with NACHC, develop, review and refine core competencies for other C-Suite Staff (CEO, CIO, and CFO) and/or Board members.
- Presentations to stakeholders, not to exceed 4

**Travel Budget Guidelines:** Please note there is no travel budget for this engagement. Should travel become necessary NACHC will reimburse in alignment with its travel policies (Attachment I).

**Content Area – National Quality Improvement (QI) Project Management**

**Scope of Work:** Selected vendor(s) will provide support to the Quality Center in NACHC’s Clinical Affairs Division (CAD). Responsibilities include QI and transformation content development, research and synthesis of the evidence, writing, training development and support, data collection, analysis and reporting. The primary audience will be health centers engaged in transformation work and QI Coordinators at State/Regional Primary Care Associations.

Selected vendor(s) will have up to 3 years engaging in and/or coaching quality improvement work and clinical workflows; experience in/with health centers a plus. Possesses strong analytical and data analysis skills and a passion for leading clinical transformation. Bachelor’s degree in relevant field; Master’s degree preferred. Experience with Electronic Health Record (EHR) and population management software preferred.

**Deliverables:** Up to 8 days per month to include:

- Literature review to gather evidence-based and promising practices to improve health outcomes, quality, and costs.
- Environmental scan to identify QI training resources/opportunities to support QI development among PCA/HCCN and health center staff; trainers/faculty for QI, Practice Transformation for QI coaches.
- Design and analyses of health center of assessment/evaluation of QI practices and practice transformation.
- Synthesize and summarize current and emerging examples of health center system transformation in fact sheets.
- Assist in the design of a communication strategy to spread results of above deliverables.

**Travel Budget Guidelines:** Please note there is no travel budget for this engagement. Should travel become necessary NACHC will reimburse in alignment with its travel policies (Attachment I).

**Content Area – National Clinical Workforce Development and Support**

**Scope of Work:** Selected vendor(s) will provide technical expertise for clinical workforce development in 4 key areas: National Health Service Corp, Teaching Health Centers, Health Professional Training, and Board Engagement.

Selected vendor(s) must have a medical degree with at least 10 years of experience at the federal level developing clinical workforce policy, programs and technical assistance for health centers. Demonstrated leadership of
interdisciplinary advisory groups consisting of (but not limited to) academic institutions, health centers and private institutions. Demonstrated understanding of oral health integration in health centers.

**Deliverables:**

- Up to 3 (90 minute) Health Center Board Trainings on clinical workforce development and quality of care including planning, delivery and post-session debrief with NACHC staff leads.
- Provide national-level, technical leadership consultation on clinical workforce support strategies for physician assistants, medical schools, and dental schools by providing input to NACHC program strategies and participation in relevant forums.
- Formally present recruitment and retention strategies to national audience. Up to 1 a month for 10 months.

**Travel Budget Guidelines:** Travel for this engagement will consist of no more than 6 nights (for 1 individual) to conduct 3 trainings for national audiences. NACHC will reimburse in accordance with its travel policies (Attachment I). Bid submission is acceptance of NACHC travel policies. If more than 6 nights stay be necessary, NACHC will coordinate additional travel resources with selected vendor.

**Content Area – Clinical Leadership Development for New Clinical Directors**

**Scope of Work:** Selected vendor(s) will co-teach a group of 50 new FQHC clinical directors and must have expertise utilizing a CME approved Core Curriculum with specific topics, including an emphasis on federal expectations of performance under Section 330 of the Public Health Service Act and related Health Center Program requirements. Topics must include: the history of health centers, service delivery models, Federal Torts Claims Act (FTCA), funding and alternative payment models, Bureau of Primary Health Care (BPHC) Health Center Program Requirements, Quality Management, Patient Centered Medical Home and Practice Transformation, and the role of the clinical director. Selected vendor(s) will participate in pre-conference curriculum refinement based pre-assessment results of the pre-registered 50 participants. Selected vendor(s) participate with NACHC staff in training course debrief post-conference and provide ongoing support for participants post-training.

Selected vendor(s) will integrate their medical degree training and at least ten years experiences working in one health center as a Chief Medical Officer to enhance the training curriculum. Selected vendor(s) demonstrates peer credibility with 5 years or more of teaching experience with high evaluation scores, participation in national core competency development for clinical directors as well as the support of his/her own health center CEO and Board.

Selected vendors will demonstrate the following experience, to be integrated into the training they deliver: experience with managing HRSA BPHC funding, service/site expansion, health center operations, clinical teams, scheduling, operational site visits, FTCA, performance and reporting requirements, electronic health record implementation and upgrades, Patient Centered Medical Home recognition programs, financial management and value based payment models.

**Deliverables:**

- Up to 5, one-and-a-half day, in-person trainings to include session planning, delivery and post-session debrief with NACHC staff leads.
- At least one, and up to five, coaching and/or clinical leadership topic-focused, intensive office hour sessions based upon post-session training needs of 50 participants.
Travel Budget Guidelines: Travel for this engagement will consist of no more than 20 nights (for up to 2 individuals) to conduct 5 trainings for national audiences. NACHC will reimburse in accordance with its travel policies (Attachment I). Bid submission is acceptance of NACHC travel policies. If more than 20 nights stay be necessary, NACHC will coordinate additional travel resources with selected vendor.

Content Area – Clinical Leadership Development - Managing Ambulatory Health Care for Executives

Scope of Work: Selected vendor(s) will co-teach a group of 50 FQHC clinical leaders (which may include CMOs, site leads, nurse managers, behavior health directors, dental directors, etc.) and must have expertise utilizing a CME approved Core Curriculum with specific topics, including an emphasis on executive leadership techniques in the context of overall administration of clinical operations. Topics must include: role of the clinical leader, financial management for clinical leaders, provider scheduling and productivity, provider compensation, clinical operations, strengthening leadership skills, managing change, clinical team building, enhancing motivation, and conflict resolution. Selected vendor(s) will participate in pre-conference curriculum refinement, and will participate in training course debrief post-conference and provide ongoing support for participants post-training.

Selected vendor(s) must have demonstrated experience and relevancy with the Harvard Case Method approach to teaching. Selected vendor(s) demonstrates the peer credibility with 15 years or more of teaching experience of health center clinical leaders with high evaluation scores.

Selected vendors will demonstrate the following in the course of their training: experience with managing HRSA BPHC funding, expansion, health center operations, clinical teams, scheduling, financial management and organizational development.

Deliverables:

- Up to 4, four-day, in-person trainings to include session planning, delivery and post-session debrief with NACHC staff leads.
  - Specifically, October 2-5, 2017 in Baltimore, MD, and January 8-11, 2018 in New Orleans, LA, with the possibility of up to two additional courses.

Travel Budget Guidelines: Travel for this engagement will consist of no more than 20 nights stay (for 3 individuals) to conduct 4 trainings for a national audience. NACHC will reimburse in accordance with its travel policies (Attachment I). Bid submission is acceptance of NACHC travel policies. If more than 20 nights stay be necessary, NACHC will coordinate additional travel resources with selected vendor.

Information Requested

Proposals must be submitted using NACHC’s web-based portal by Sept. 6, 2017, Midnight ET. Please click on the “online form” link to be directed to our online submission form. If NACHC selects your proposal, you will be notified no later than September 15, 2017.

Proposals must be complete in order to be considered. Incomplete proposals will not be considered. Proposals must contain:

- Point of Contact Information
- **Name/Description of Organization:** specifically state if you are an independent consultant or a multi-individual or corporate applicant
- **Vendor status verification:** U.S. System Award Management (SAM), or equivalent, search results for individual trainer(s) and organization
- **Capability statement** that demonstrates you/your organization’s ability deliver services in the content areas chosen and in the venue identified, specifically:
  - Evidence of successful and effective training delivery in the selected content areas to the targeted audience(s) (as appropriate);
  - Demonstrated current, content knowledge of the federal Health Center Program authorized under Section 330 of the Public Health Service Act and its related policies and guidance. (Page limit: not to exceed two pages)
- **Curriculum Vitae (CV) or Resume for principal trainer/expert** (Page Limit: 2 pages per trainer/expert)
- **One sample presentation/publication** that demonstrates understanding of both the FQHC environment and topic area
- **One past training evaluation** demonstrating quantitative and/or qualitative feedback from students (as appropriate)
- **Timeline for Project Implementation** that demonstrates appropriate planning and delivery.
- **Budget and Budget Narrative** – Include a short justification (not to exceed one page) that explains the rationale for your budget presentation in the template below. Please ensure costs are broken out by deliverable, where appropriate please further delineate cost of training delivery and training development. No travel costs need to be noted for this submission, bid submission is acceptance of NACHC travel and reimbursement policy (Attachment I).

**Budget Template & Justification**

**DIRECT LABOR** - Hourly Rate should reflect overall cost rate inclusive of any fringe, overhead and/or general & administrative expense (G&A), if required.

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<th>Title or Labor Category</th>
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<th>Number of Hours</th>
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**Evaluation Criteria**

Proposals submitted will be evaluated using the criteria below. Incomplete applications will not be considered.

<table>
<thead>
<tr>
<th>Selection Domain</th>
<th>Application Selection Criteria</th>
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| Capability Statement      | Capability statement that demonstrates you/your organization’s ability deliver services in the content areas chosen and in the venue identified, such as:  
  • Evidence of successful and effective training delivery in the selected content areas to the targeted audience(s) (as appropriate);  
  • Demonstrated current, content knowledge of the federal Health Center Program authorized under Section 330 of the Public Health Service Act and its related policies and guidance. (page limit: not to exceed two pages) | 35     |
| Experience and Education  | Resumes/CVs clearly show tenure, professional experience and/or education that reflects knowledge and ability in content expertise and training                                                                                     | 20     |
| Proposed Budget,          | Reasonableness of proposed budget and timeline for project implementation, inclusive of preparation and delivery.                                                                                                                  | 20     |
| Budget Narrative and      |                                                                                                                                                                                                                                |        |
| Project Timeline          |                                                                                                                                                                                                                                |        |
| Work Samples              | Demonstrate strong communications skills, understanding of adult learning needs and content knowledge, as evidenced by:  
  o Sample presentation(s)  
  o Training evaluation data  
  o Qualitative data and/or testimonials from community health centers or related audiences (if applicable and available)  
  o Publications (no more than 10 pages)                                                                                                                                   | 10     |
| Vendor Status Verification| Proof of vendor in good standing via the U.S. government’s System for Award Management (SAM), or equivalent.                                                                                                                   | 10     |
| Completeness of Application| Application materials submitted are responsive to RFP guidance, clear and complete.                                                                                                                                          | 5      |
| Total                     |                                                                                                                                                                                                                                | 100    |
ATTESTATION

By my signature, title and date below, I hereby certify that this Proposal reflects my best estimate of the capability of organization and the true and necessary costs for the project, and the information provided herein is accurate, complete and current as of the date of my signature below.

I agree that NACHC shall own all right, title, and interest in and to all works produced by Contractor pursuant to this Contract irrespective of medium of production, including, but not limited to, meeting notes, documents, tools, data, presentations, and teleforums, and all additions to, deletions from, alterations of, or revisions of such works, and each element and part thereof.

I agree that any training sessions may be recorded by NACHC for archived reference by participants or funders, as needed.

Print Name:
Signature:
Title:
Organization:
Date:
Attachment I: NACHC Consultant Travel Policies and Procedures

To help promote good stewardship and cost-efficiency we have included the following NACHC travel principles. They provide helpful guidance for booking air travel, making hotel arrangements, and securing ground transportation. Each vendor must be a responsible steward for NACHC’s resources.

Adherence to this policy is strictly required. NACHC cannot provide reimbursement for undocumented expenses.

- We will reimburse coach air travel as far in advance as possible to take advantage of low-cost fares. We will only reimburse the coach rate.

- Do your own research for transportation and travel options on the internet. This includes hotels and car rentals.

- When making hotel reservations, look at all rate rules and options and choose accordingly. If possible, take advantage of discounts offered as bundles with air and car rental options.

- Consider purchasing the travel insurance (generally less than $25.00 per occurrence) offered by airlines and hotels to mitigate penalties for trip changes or cancellations. This could be especially valuable if you book further ahead and realize your plans may need to change.

- Limit the use of car services (limo/town cars) for local meetings.

- Limit the use of car services (limo/town cars) for transportation to and from the airport. Affordable and cost effective resources include:
  - Taxis – share taxis or Uber car share services with other staff members when possible
  - Shared airport shuttle services (e.g. Super Shuttle)
  - Hotel provided shuttles, where available
  - Public transportation

- Other reimbursable expenses include any business use of copying, messenger service, phone/internet access, audio visual, supplies, shipping expenses, etc. as long as it is related to your scope of work and has been approved in advance.

- Meals incidental to business meetings must be preapproved, include the participants and the business purpose and must include the itemized receipt. Under no circumstances is alcohol charge allowable.

Reimbursement

No reimbursement for authorized expenses shall be made unless and until selected Vendor/Contractor provides NACHC with documentation of expenses as follows:
1. Include the original receipts for all travel expenses, including airline ticket receipts, taxi or shuttle receipts, hotel receipts, rental car or mileage (if using a personal car) receipts or documentation, and other miscellaneous receipts. Private automobile mileage is reimbursed at the current IRS rate based on beginning and ending odometer readings. Reimbursement for tolls and parking require a receipt.

2. If reimbursed by NACHC for travel time, the following applies for each one-way trip:
   a. Traveling within the same time zone – the lesser of actual time or 4 hours;
   b. Traveling within one to two time zones – the lesser of actual or 6 hours;
   c. Traveling within three or more time zones – the lesser of actual or 8 hours.

3. Meals will be paid on a per diem basis:
   a. If the trip begins before 12 noon, reimbursement is $40/day.
   b. If the trip begins after 12 noon, reimbursement is $20 for that day.

Three hours prior to a flight or train departure is reasonable in determining your per diem amount.

4. Selected vendor/consultant must submit complete invoices for payment to NACHC within 30 days of service delivery.