

THE UNIVERSITY OF RHODE ISLAND

Solicitation Information 12/5/23

RFP# 101328

TITLE: RFP - ELECTRONIC HEALTH RECORD (EHR) SYSTEM

Submission Deadline: 1/2/24 9:30 AM (Eastern Time)

PRE-BID/ PROPOSAL CONFERENCE: NO
MANDATORY:

If YES, any Vendor who intends to submit a bid proposal in response to this solicitation must have its designated representative attend the mandatory Pre-Bid/ Proposal Conference. The representative must register at the Pre-Bid/ Proposal Conference and disclose the identity of the vendor whom he/she represents.

DATE:
LOCATION:

Questions concerning this solicitation must be received by the URI Purchasing Department at URIPurchasing@uri.edu no later than **12/14/23 12:00PM (EST)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

BID SURETY BOND REQUIRED: NO

PAYMENT AND PERFORMANCE BOND REQUIRED: NO

DEBRA LEE/r/c PURCHASING AGENT

Note to Applicants:

- Applicants should register on-line at the URI Controller's Website at <https://web.uri.edu/controller/accounts-payable/suppliers/>
- Proposals received without a completed URI Bidder Certification Form may result in disqualification.

Respondent Information:

Company Name _____

Address _____

Contact Name _____

Contact Email _____ :

Contact Phone _____

University of Rhode Island Bidder Certification Form
Board of Trustees Procurement Regulations

ALL OFFERS ARE SUBJECT TO THE REQUIREMENTS, PROVISIONS AND PROCEDURES CONTAINED IN THIS CERTIFICATION FORM. Offerors are expected to read, sign and comply with all requirements. Failure to do so may be grounds for disqualification of the offer contained herein.

Rules for Submitting Offers

This Certification Form must be attached in its entirety to the front of the offer and shall be considered an integral part of each offer made by a vendor to enter into a contract with the University of Rhode Island. As such, submittal of the entire Bidder Certification Form, signed by a duly authorized representative of the offeror attesting that he/she (1) has read and agrees to comply with the requirements set forth herein and (2) to the accuracy of the information provided and the offer extended, is a mandatory part of any contract award.

To assure that offers are considered on time, each offer must be submitted with the specific Bid/RFP/LOI number, date and time of opening marked in the upper left hand corner of the envelope. Each bid/offer must be submitted in separate sealed envelopes.

A complete signed (in ink) offer package must be delivered to the University of Rhode Island Purchasing Office by the time and date specified for the opening of responses in a sealed envelope.

Bid responses must be submitted on the URI bid solicitation forms provided, indicating brand and part numbers of items offered, as appropriate. Bidders must submit detailed cuts and specs on items offered as equivalent to brands requested WITH THE OFFER. Bidders must be able to submit samples if requested.

Documents misdirected to other State or University locations or which are not present in the University of Rhode Island Purchasing Office at the time of opening for whatever cause will be deemed to be late and will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the University of Rhode Island Purchasing Office. Postmarks shall not be considered proof of timely submission.

RIVIP SOLICITATIONS. To assure maximum access opportunities for users, public bid solicitations shall be posted on the RIVIP for a minimum of seven days and no amendments shall be made within the last five days before the date an offer is due. Except when access to the Web Site has been severely curtailed and it is determined by the Purchasing Agent that special circumstances preclude extending a solicitation due date, requests to mail or fax hard copies of solicitations will not be honored.

PRICING. Offers are irrevocable for sixty (60) days from the opening date (or such other extended period set forth in the solicitation), and may not be withdrawn, except with the express permission of the University Purchasing Agent. All pricing will be considered to be firm and fixed unless otherwise indicated. The University of Rhode Island is exempt from Federal excise taxes and State Sales and Use Taxes. Such taxes shall not be included in the bid price.

ALL PRICES QUOTED ARE FOB DESTINATION.

DELIVERY and PRODUCT QUALITY. All offers must define delivery dates for all items; if no delivery date is specified, it is assumed that immediate delivery from stock will be made. The contractor will be responsible for delivery of materials in first class condition. Rejected materials will be at the vendor's expense.

PREVAILING WAGE, OSHA SAFETY TRAINING and APPRENTICESHIP REQUIREMENTS. Bidders must comply with the provisions of the Rhode Island labor laws, including R.I. Gen. Laws §§ 37-13-1 et seq. and occupational safety laws, including R.I. Gen. Laws §§ 28-20-1 et seq. These laws mandate for public works construction projects the payment of prevailing wage rates, the implementation and maintenance of occupational safety standards, and for projects with a minimum value of \$1 Million, the employment of apprentices. The successful Bidder must submit certifications of compliance with these laws from each of its subcontractors prior to their commencement of any work. Prevailing wage rates, apprenticeship requirements, and other workforce and safety regulations are accessible at www.dlt.ri.gov.

PUBLIC RECORDS. Offerors are advised that all materials submitted to the University for consideration in response to this solicitation will be considered without exception to be Public Records pursuant to Title 38 Chapter 2 of the Rhode Island General Laws, and will be released for inspection immediately upon request once an award has been made. Offerors are encouraged to attend public bid/RFP openings to obtain information; however, bid/RFP response summaries may be reviewed after award(s) have been made by visiting the Rhode Island Vendor Information Program (RIVIP) at www.purchasing.ri.gov > Solicitation Opportunities > Other Solicitation Opportunities. Telephone requests for results will not be honored. Written requests for results will only be honored if the information is not available on the RIVIP.

Award will be made to the responsive and responsible offeror quoting the lowest net price in accordance with specifications, for any individual item(s), for major groupings of items, or for all items listed, at the University's sole option.

BID SURETY. Where bid surety is required, bidder must furnish a bid bond or certified check for 5% of the bid total with the bid, or for such other amount as may be specified. Bids submitted without a required bid surety will not be considered.

SPECIFICATIONS. Unless specified “no substitute”, product offerings equivalent in quality and performance will be considered (at the sole option of the University) on the condition that the offer is accompanied by detailed product specifications. Offers which fail to include alternate specifications may be deemed nonresponsive.

VENDOR AUTHORIZATION TO PROCEED. When a purchase order, change order, contract/agreement or contract/agreement amendment is issued by the University of Rhode Island, no claim for payment for services rendered or goods delivered contrary to or in excess of the contract terms and scope shall be considered valid unless the vendor has obtained a written change order or contract amendment issued by the University of Rhode Island Purchasing Office PRIOR to delivery.

Any offer, whether in response to a solicitation for proposals or bids, or made without a solicitation, which is accepted in the form of an order OR pricing agreement made in writing by the University of Rhode Island Purchasing Office, shall be considered a binding contract.

REGULATIONS, GENERAL TERMS AND CONDITIONS GOVERNING STATE AND THE UNIVERSITY OF RHODE ISLAND CONTRACTS. This solicitation and any contract or purchase order arising from it are issued in accordance with the specific requirements described herein, and the State’s [Purchasing Laws](#) and the [URI Board of Trustees Regulations and General Terms and Conditions of Purchase](#).

EQUAL EMPLOYMENT OPPORTUNITY. Compliance certificate and agreement procedures will apply to all awards for supplies or services valued at \$10,000 or more. Minority Business Enterprise policies and procedures, including subcontracting opportunities as described in Title 37 Chapter 14.1 of the Rhode Island General Laws also apply.

PERFORMANCE BONDS. Where indicated, successful bidder must furnish a 100% performance bond and labor and payment bond for contracts subject to Title 37 Chapters 12 and 13 of the Rhode Island General Laws. All bonds must be furnished by a surety company authorized to conduct business in the State of Rhode Island. Performance bonds must be submitted within 21 calendar days of the issuance of a tentative notice of award.

DEFAULT and NON-COMPLIANCE Default and/or non-compliance with the requirements and any other aspects of the award may result in withholding of payment(s), contract termination, debarment, suspension, or any other remedy necessary that is in the best interest of the state/University of Rhode Island.

COMPLIANCE Vendor must comply with all applicable federal, state and local laws, regulations and ordinances.

SPRINKLER IMPAIRMENT AND HOT WORK. The Contractor agrees to comply with the practices of the State’s Insurance carrier for sprinkler impairment and hot work. Prior to performing any work, the Contractor shall obtain the necessary information for compliance from the Risk Management Office at the Department of Administration or the Risk Management Office at the University of Rhode Island.

Each bid proposal for a *public works project* must include a “public copy” to be available for public inspection upon the opening of bids. **Bid Proposals that do not include a copy for public inspection will be deemed nonresponsive.**

For further information on how to comply with this statutory requirement, see [R.I. Gen. Laws §§ 37-2-18\(b\) and \(j\)](#). Also see State of Rhode Island Procurement Regulation 5.11 at : <https://ridop.ri.gov/about-us/procurement-statutes-and-regulations>

SECTION 2 – DISCLOSURES

ALL CONTRACT AWARDS ARE SUBJECT TO THE FOLLOWING DISCLOSURES & CERTIFICATIONS

Offerors must respond to every disclosure statement. A person authorized to enter into contracts must sign the offer and attest to the accuracy of all statements.

Indicate Yes (Y) or No (N):

____ 1 State whether your company, or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has been subject to suspension or debarment by any federal, state, or municipal government agency, or the subject of criminal prosecution, or convicted of a criminal offense with the previous five (5) years. If Yes, then provide details below.

____ 2 State whether your company, or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has had any contracts with a federal, state or municipal government agency terminated for any reason within the previous five (5) years. If Yes, then provide details below.

____ 3 State whether your company or any owner, stockholder, officer, director, member, partner, or principal thereof, or any subsidiary or affiliated company, has been fined more than \$5000 for violation(s) of Rhode Island environmental laws by the Rhode Island Department of Environmental Management within the previous five (5) years. If Yes, then provide details below.

____ 4 State whether any officer, director, manager, stockholder, member, partner, or other owner or principal of the Bidder is serving or has served within the past two calendar years as either an appointed or elected official of any state governmental authority or quasi-public corporation, including without limitation, any entity created as a legislative body or public or state agency by the general assembly or constitution of this state. If Yes, then provide details below.

IF YOU HAVE ANSWERED “YES” TO QUESTIONS #1 – 4 PROVIDE DETAILS/EXPLANATION IN AN ATTACHED STATEMENT. INCOMPLETE CERTIFICATION FORMS SHALL BE GROUNDS FOR DISQUALIFICATION OF OFFER.

SECTION 3 - OWNERSHIP DISCLOSURE

Vendors must provide all relevant information. Bid proposals submitted without a complete response may be deemed nonresponsive.

If the vendor is privately held, the vendor shall provide ownership information below.

List each officer, director, manager, stockholder, member, partner, or other owner or principle of the Bidder, and each intermediate parent company and the ultimate parent company of the Bidder. For each individual, provide his or her name, business address, principal occupation, position with the Vendor, and the percentage of ownership, if any, he or she holds in the Vendor, and each intermediate parent company and the ultimate parent company of the Vendor.

If the company is publicly held, the vendor may provide owner information about only those stockholders, members, partners, or other owners that hold at least 10% of the record or beneficial equity interests of the vendor; otherwise, complete ownership disclosure is required.

SECTION 4 - CERTIFICATIONS

Bidders must respond to every statement. Bid proposals submitted without a complete response may be deemed nonresponsive.

Indicate "Y" (Yes) or "N" (No), and if "No," provide details below.

THE VENDOR CERTIFIES THAT:

____ 1 I/we certify that I/we will immediately disclose, in writing, to the University Purchasing Agent any potential conflict of interest which may occur during the course of the engagement authorized pursuant to this contract.

____ 2 I/we acknowledge that, in accordance with (1) Chapter §37-2-54(c) of the Rhode Island General Laws "no purchase or contract shall be binding on the state or any agency thereof unless approved by the Department [of Administration] or made under general regulations which the Chief Purchasing Officer may prescribe," and (2) RIGL section §37-2-7(16) which identifies the URI Board of Trustees as a public agency and gives binding contractual authority to the University Purchasing Agent, including change orders and other types of contracts and under State Purchasing Regulation 8.2.B any alleged oral agreement or arrangements made by a bidder or contractor with any agency or an employee of the University of Rhode Island may be disregarded and shall not be binding on the University of Rhode Island.

____ 3 I/we certify that I or my/our firm possesses all licenses required by Federal and State laws and regulations as they pertain to the requirements of the solicitation and offer made herein and shall maintain such required license(s) during the entire course of the contract resulting from the offer contained herein and, should my/our license lapse or be suspended, I/we shall immediately inform the University of Rhode Island Purchasing Agent in writing of such circumstance.

____ 4 I/we certify that I/we will maintain required insurance during the entire course of the contract resulting from the offer contained herein and, should my/our insurance lapse or be suspended, I/we shall immediately inform the University of Rhode Island Purchasing Agent in writing of such circumstance.

____ 5 I/we certify that I/we understand that falsification of any information herein or failure to notify the University of Rhode Island Purchasing Agent as certified herein may be grounds for suspension, debarment and/or prosecution for fraud.

____ 6 I/we acknowledge that the provisions and procedures set forth in this form apply to any contract arising from this offer.

____ 7 I/we acknowledge that I/we understand the State's Purchasing Laws ([§37-2 of the General Laws of Rhode Island](#)) and the [URI Board of Trustees Regulations](#) apply as the governing conditions for any contract or purchase order I/we may receive from the University of Rhode Island, including the offer contained herein.

____ 8 I/we certify that the bidder: (i) is not identified on the General Treasurer's list, created pursuant to R.I. Gen. Laws § 37-2.5-3, as a person or entity engaging in investment activities in Iran described in § 37-2.5-2(b); and (ii) is not engaging in any such investment activities in Iran.

____ 9 If the product is subject to Department of Commerce Export Administration Regulations (EAR) or International Traffic in Arms Regulations (ITAR), please provide the Export Control Classification Number (ECCN) or the US Munitions List (USML)
Category: _____

____ 10 I/we certify that the above information is correct and complete.

IF YOU ARE UNABLE TO CERTIFY YES TO QUESTIONS #1 – 8 and 10 OF THE FOREGOING, PROVIDE DETAILS/EXPLANATION IN AN ATTACHED STATEMENT. INCOMPLETE CERTIFICATION FORMS SHALL BE GROUNDS FOR DISQUALIFICATION OF OFFER.

Signature below commits vendor to the attached offer and certifies (1) that the offer has taken into account all solicitation amendments where applicable, (2) that the above statements and information are accurate and that vendor understands and has complied with the requirements set forth herein.

Vendor/Company Name; _____

Vendor's Signature: _____ Bid Number: _____ Date: _____
(Person Authorized to enter into contracts; signature must be in ink) (if applicable)

Print Name and Title of Company official signing offer

SECTION 1: INTRODUCTION

The University of Rhode Island Board of Trustees /University of Rhode Island is soliciting proposals for an Electronic Health Record (EHR) System from qualified OFFERORS to provide an EHR system which would best serve the needs of Health Services, Counseling Center, the Psychological Consultation Center, Athletics and Disability, Access and Inclusion in accordance with the terms of this Request for Proposal (“RFP”) and General Terms and Conditions of Purchase indicated on the attached Bidder Certification Form.

The initial contract period will begin approximately July 1, 2024, for three years, payable annually. Contracts may be renewed for up to two additional 12-month periods, again each payable annually based on vendor performance and the availability of funds.

This is a Request for Proposals, not a Request for Quotes. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to cost; there will be no public opening and reading of responses received by the University of Rhode Island Purchasing Department pursuant to this solicitation, other than to name those offerors who have submitted proposals.

Instructions and Notifications to Offerors

1. Potential offerors are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this RFP are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP may be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP or for providing oral or written clarification of its content shall be borne by the vendor. The University assumes no responsibility for these costs even if the RFP is cancelled or continued.
4. Proposals are considered to be irrevocable for a period of not less than 180 days following the opening date, and may not be withdrawn, except with the express written permission of the University of Rhode Island Purchasing Agent.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated in the proposal.
6. It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will assume responsibility for all aspects of the work. Subcontracts are permitted, provided that their use is clearly indicated in the vendor's proposal, and the subcontractor(s) to be used is identified in the proposal.
7. The purchase of goods and/or services under an award made pursuant to this RFP will be contingent on the availability of appropriated funds.

8. Vendors are advised that all materials submitted to the University of Rhode Island Purchasing Department for consideration in response to this RFP may be considered to be public records, as defined in R. I. Gen. Laws § 38-2-1, *et seq.*, and may be released for inspection upon request, once an award has been made.

Any information submitted in response to this RFP that a vendor believes are trade secrets or commercial or financial information which is of a privileged or confidential nature should be clearly marked as such. The vendor should provide a brief explanation as to why each portion of information that is marked should be withheld from public disclosure. Vendors are advised that the University of Rhode Island Purchasing Department may release records marked confidential by a vendor upon a public records request if the University determines the marked information does not fall within the category of trade secrets or commercial or financial information which is of a privileged or confidential nature. Vendors are also advised that responses marked confidential in their entirety may be deemed non-responsive. **Inclusion of a “confidentiality header/footer” on entire pages of submissions (or all pages) is NOT considered an acceptable way to flag confidential information (flags must be very specific and a specific justification explaining how the information meets the APRA exception must be provided with it) and will not be recognized by URI.**

9. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
10. By submission of proposals in response to this RFP vendors agree to comply with R. I. General Laws § 28-5.1-10 which mandates that contractors/subcontractors doing business with the State of Rhode Island exercise the same commitment to equal opportunity as prevails under Federal contracts controlled by Federal Executive Orders 11246, 11625 and 11375.

Vendors are required to ensure that they, and any subcontractors awarded a subcontract under this RFP, undertake or continue programs to ensure that minority group members, women, and persons with disabilities are afforded equal employment opportunities without discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability.

Vendors and subcontractors who do more than \$10,000 in government business in one year are prohibited from engaging in employment discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability, and are required to submit an “Affirmative Action Policy Statement.”

Vendors with 50 or more employees and \$50,000 or more in government contracts must prepare a written “Affirmative Action Plan” prior to issuance of a purchase order.

- a. For these purposes, equal opportunity shall apply in the areas of recruitment, employment, job assignment, promotion, upgrading, demotion, transfer, layoff, termination, and rates of pay or other forms of compensation.

- b. Vendors further agree, where applicable, to complete the “Contract Compliance Report” (as well as the “Certificate of Compliance”) <https://dedi.ri.gov/divisions-units/equal-opportunity-office/contract-compliance-related-forms> and submit both documents, along with their Affirmative Action Plan or an Affirmative Action Policy Statement, prior to issuance of a purchase order. For public works projects vendors and all subcontractors must submit a “Monthly Utilization Report” to the ODEO/State Equal Opportunity Office, which identifies the workforce actually utilized on the project.

For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via e-mail at <https://dedi.ri.gov/divisions-units/equal-opportunity-office> .

11. In accordance with R. I. Gen. Laws § 7-1.2-1401 no foreign corporation has the right to transact business in Rhode Island until it has procured a certificate of authority so to do from the Secretary of State. This is a requirement only of the successful vendor(s). For further information, contact the Secretary of State at (401-222-3040).
12. In accordance with R. I. Gen. Laws §§ 37-14.1-1 and 37-2.2-1 it is the policy of the State to support the fullest possible participation of firms owned and controlled by minorities (MBEs) and women (WBEs) and to support the fullest possible participation of small disadvantaged businesses owned and controlled by persons with disabilities (Disability Business Enterprises a/k/a “DisBE”)(collectively, MBEs, WBEs, and DisBEs are referred to herein as ISBEs) in the performance of State procurements and projects. As part of the evaluation process, vendors will be scored and receive points based upon their proposed ISBE utilization rate in accordance with 150-RICR-90-10-1, “Regulations Governing Participation by Small Business Enterprises in State Purchases of Goods and Services and Public Works Projects”. As a condition of contract award vendors shall agree to meet or exceed their proposed ISBE utilization rate and that the rate shall apply to the total contract price, inclusive of all modifications and amendments. Vendors shall submit their ISBE participation rate on the enclosed form entitled “MBE, WBE and/or DisBE Plan Form”, which shall be submitted in a separate, sealed envelope as part of the proposal. ISBE participation credit will only be granted for ISBEs that are duly certified as MBEs or WBEs by the State of Rhode Island, Department of Administration, Office of Diversity, Equity and Opportunity or firms certified as DisBEs by the Governor’s Commission on Disabilities. The current directory of firms certified as MBEs or WBEs may be accessed at <https://dedi.ri.gov/divisions-units/minority-business-enterprise-compliance-office> . Information regarding DisBEs may be accessed at www.gcd.ri.gov.

For further information, visit the Office of Equity, Diversity and Inclusion’s website, at <https://dedi.ri.gov/> and see R.I. Gen. Laws Ch. 37-14.1, R.I. Gen. Laws Ch. 37-2.2, and 150-RICR-90-10-1.

13. HIPAA - Under HIPAA, a “business associate” is a person or entity, other than a member of the workforce of a HIPAA covered entity, who performs functions or activities on behalf of, or provides certain services to, a HIPAA covered entity that involves access by the business associate to HIPAA protected health information. A “business associate” also is a subcontractor that creates, receives, maintains, or transmits HIPAA protected health information on behalf of another business associate. The HIPAA rules generally require

that HIPAA covered entities and business associates enter into contracts with their business associates to ensure that the business associates will appropriately safeguard HIPAA protected health information. Therefore, if a Contractor qualifies as a business associate, it will be required to sign a HIPAA business associate agreement.

14. . Complete a Higher Education Community Offeror Assessment Toolkit (HECVAT)

Full assessment: The Full HECVAT, published

<https://library.educause.edu/resources/2020/4/higher-education-community-offeror-assessment-toolkit>, needs to be completed by each offeror. The “HECVAT” is intended

to simplify and speed up the process of gathering the information to assess the controls used by your organization to protect the University’s data, comply with the terms of the Agreement and to provide an operationally stable, protected, and recoverable service.

The completed copy of the HECVAT, provided with your RFP response, will be reviewed and approved for compliance by the Chief Information Security Officer (CISO) prior to the Technical Review. HECVATs not approved by the URI CISO will not proceed to the Technical Review.

15. Offeror agrees to secure the confidentiality of all information and records by applicable federal and state laws, rules, and regulations. Offeror understands that the Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. §1232g governs the privacy and security of educational records and information and agrees to abide by FERPA rules and regulations, as applicable.

Restrictions on Communications – No Bidder-initiated contact, other than normal business activities not associated with this procurement, will be allowed after the issuance of this RFP between Bidders and University employees or their agents regarding this solicitation, except with express permission of the University Purchasing Department. Any such other contact may be considered improper and may disqualify a Bidder from further consideration. The appropriate channel to direct any communications, concerns or questions regarding the RFP is through the email address provided herein.

If a Bidder fails to notify the University of Rhode Island Purchasing Department contact person of an error in this RFP which was known or reasonably should have been known to the Bidder, the Bidder shall submit a response at the Bidder's own risk. If awarded the contract, the Bidder shall not be entitled to additional compensation or performance time by reason of the error or its later correction.

SECTION 2: BACKGROUND

URI Health Services, conveniently located in the Potter Building adjacent to the URI resident halls complex, is a comprehensive ambulatory health center that is nationally recognized through accreditation by the Joint Commission, and membership in the American College Health Association. Services provided include ambulatory medical services, office visits, specialty clinics, allergy, immunization and travel services, psychiatric services, pharmacy, x-ray, and laboratory services on site. Our health promotion department provides educational programs along with nutritional services

and counseling. Please visit URI Health Services' website for additional details on its programs and services: <https://web.uri.edu/healthservices/>.

URI Counseling Center provides short-term, confidential support for the personal, emotional, and academic well-being of students. The Counseling Center helps students lead successful and fulfilling lives through counseling, referrals, outreach programs and online self-assessments. Please visit URI Counseling Center's website for additional details on its programs and services: <https://web.uri.edu/counseling/>.

Psychological Consultation Center (PCC) is a mental health service, research, and training facility that serves both the URI and greater Rhode Island community. Established in 1968, the PCC is a training clinic for doctoral level graduate students in the Clinical Psychology graduate program offered through the Department of Psychology at URI. The PCC offers individual treatment, adult assessment services, and a specialty clinic for children with anxiety. Please visit the PCC's website for additional details on its programs and services: <https://web.uri.edu/pcc/>.

URI Athletics. The primary goal of the University of Rhode Island sports medicine staff is to provide the best medical care possible to all varsity student-athletes. The entire medical staff is devoted to the education, health and injury care, prevention, evaluation, and rehabilitation of athletic related injuries. The sports medicine staff is dedicated to returning athletes to their sport in the safest and quickest manner as possible. The sports medicine staff is comprised of athletic trainers who are certified by the National Athletic Association and are licensed by the state of Rhode Island. Athletic training students (interns), designated team physicians, team orthopedists and a host of medical consultants and sub-specialists supplement the primary staff. Please visit the Athletics website for additional details on its programs and services: <https://gorhody.com/sports/2020/6/9/information-sports-medicine-index.aspx>.

URI Disability, Access, and Inclusion (DAI): DAI works with students, faculty, and staff to create accessible and inclusive living and learning environments. We facilitate access, discourse, and involvement through respectful partnerships, innovative practices and technology, student-informed programs, as well as mentorship and leadership opportunities. Otherwise, qualified students who identify as having a disability or chronic condition have the right to equal access to the educational programs, services, activities, and facilities throughout the university. Reasonable accommodations are determined on a case-by-case basis, in compliance with the requirements of the Americans with Disabilities Act (ADAAA), Sections 504 and 508 of the Rehabilitation Act, and URI policy. Please visit the DAI website for additional details on its programs and services: <https://web.uri.edu/disability/>.

This RFP serves the purpose of identifying a qualified offeror to provide, customize, and implement an advanced EHR system that caters specifically to the needs of the URI Health Center, Counseling Center, the PCC, Athletics and DAI. The selected system should transform the management of student health records, elevate healthcare delivery standards, seamlessly integrate with existing IT infrastructure, integrate with internal and external healthcare entities, ensure top-tier data security, and align with applicable regulations and best practices.

Currently Health Services and the PCC utilizes Medicat as its EHR with interoperability of the following third-party software:

- Rcopia – E-Prescribing
- Relaymed - Connects POC testing devices to EHR
- Proparm – Used by Pharmacy Department

- Waystar – Clearinghouse insurance claim management software
- LabCorp – Reference Lab
- Rhode Island Medical Imaging (RIMI)
- Kidsnet - secure database for critical information about children's health/vaccination records
- Flywire – Online payment system

SECTION 3: SCOPE OF WORK AND REQUIREMENTS

General Scope of Work

- Deployment of a comprehensive EHR system, for medical and counseling services, which manages student health records, medical histories, diagnoses, treatment plans, prescriptions, and billing information.
- Single or Bidirectional integration with existing systems (Peoplesoft, Rcopia, Relaymed, Propharm, Waystar, LabCorp, Rhode Island Medical Imaging, Kidsnet, and Flywire) and/or offer these services in EHR software proposal (i.e., offer these services within proposed EHR system using either similar third-party software or software that's native to the EHR system).
- Cloud-based EHR with data stored in United States with built in redundancies/production hosting services.
- Proposed System/Solution offeror must have a United States based customer service center.
- System has integrated telemedicine, and counseling platforms.
- System can host telehealth sessions.
- Ensure the EHR system is user-friendly and intuitive for both healthcare providers and administrative staff.
- Be forward-thinking to update EHR system as regulations/technology evolve over time.
- Enhance patient engagement through a secure patient portal that enables access to medical records, appointment scheduling, and secure communication with healthcare providers.
- Integration with existing systems, such as Peoplesoft with scalability to projected university enhancements (i.e., Workday, Banner, Canvas, etc.).
- Compliant with University's single sign-on (SSO) policies.
- Comply with federal, state, local and university regulations, and requirements.
- Adherence to data protection regulations, including FERPA, HIPAA, CURES Act, HITECH and other privacy laws.
- Can provide HECVAT report, SOC2 report, and listing of security controls.
- Include system design, development, testing, training, integration with other systems, data migration, go-live assessment, and troubleshooting.

Specific Activities / Tasks

A. Healthcare Provider Tools:

1. **E-Prescribing:** The system enables submitting electronic prescriptions (e-prescription, e-Rx) directly to pharmacies.
2. **Medication Tracking (eMAR):** The system can automatically track medications with an Electronic Medication Administration record (eMAR).

3. **Medication Updates:** The system has regular updates to the database of available medications so that prescriptions and orders can be kept current.
4. **Computerized physician order entry (CPOE):** The system includes CPOE tools to enable medication orders to be directly entered. The system permits CPOE templates to be created to simplify repeated order entry. The system allows for the ability to tab between patients.
5. **Order Sets:** The system permits order sets to be created, so that patients with similar conditions can easily be assigned the same orders.
6. **Voice Recognition:** The system includes voice recognition for voice-to-chart, direct dictation, and to simplify physician workflow.
7. **Secure Direct Messaging (SDM):** The system offers direct messaging (instant message), which enables communication with other providers and medical staff. Internal messaging among HS staff (and PCC, CAPs).
8. **Referral Transmission:** The system can send information directly to referring physicians.
9. **Telephone Nurse Triage:** The system allows for interoperability with telephone triage protocols (i.e., Clear Triage).
10. **Counseling:** EHR system includes treatment plans and notes. Enables therapists to record session notes, assessments, and treatment progress. Integrates with telehealth using secure video conferencing. Includes tools for administering and scoring psychological assessments. Allows therapist to track patient progress using standardized outcome measures.

B. Billing and Insurance:

1. Billing:

- a. The system provides an e-statement function to send monthly billing statements to patients with a balance.
- b. Provide an option for billable services as processed and charged to the student's university account.
- c. Provide itemized billing statements at the students' request for reimbursement from their insurance companies.
 - Support up to 3 insurance companies per patient.
 - Track insurance authorizations and issue reminder when new authorization needed.
 - Allow different place of service options (02, 95, office, telehealth, ambulance, etc.)
 - Ability to add/customize CPT/procedure codes and associated fees as well as transaction codes such as HSFOW, AdminWO, etc.
 - Can integrate with payment systems (i.e., Flywire) to post current patient balances.
2. **Third-Party Billing:** Offers the option for either built-in or third-party interoperable, credentialing, and collections services.
3. **Logic:** EHR system offers coding logic functions built in.
4. **Balancing Reports:** The system can print a deposit report filtered by user.
5. **Clearinghouse:** The system will utilize a clearinghouse for billable services at the health center.
6. **Insurance Interaction:** The system enables management of insurance reimbursement coding, such as for Medicare or Medicaid or other major commercial payers such as BCBS, UHC, Cigna, etc. to facilitate proper paperwork submission.
7. **Claim Validation:** System can review insurance claims to ensure that patient data is correctly formatted to reduce errors and expedite insurance payment.
8. **Electronic Remittance Advice (ERA):** The system automatically receives, posts and reconciles electronic insurance payments based on electronic remittance advice (ERA) reports.

9. **Insurance Verification:** EHR system has either built-in or third-party interoperable medical clearing-house technology that allows for real time insurance eligibility verification, ensuring coverage before treatment.

C. Health Information Management:

1. Immunizations:

- a. Immunization registry and submission tracking component
- b. Immunization entry and compliance manager to include both manual and automatic compliance tracking, and access to Rhode Island and other state's immunization registries.

2. Patient Portal:

- a. **Patient Portal:** Patient-centric portal which presents useful information to patients, such as lab results, visit summary, appointment scheduling, forms, and educational resources.
- b. **Appointment Scheduling:** The system maintains patient appointment schedules, so that patients and providers are aware of bookings.
- c. **Online Booking:** The system permits appointments to be booked online.
- d. **Automatic Reminders:** The system can send out automatic reminders to patients about upcoming bookings, prescription refills, or other important events.
- e. **Patient Education:** The system provides access to educational resources for patients to study.

3. **Secure Messaging:** System provides option to send secure messages to patients via email and/or text message.

D. Pharmacy:

1. **Interoperability with ProPharm or offer similar pharmacy software:** ProPharm, with priority on daily download of Patient Demographics or offer equivalent within the EHR proposal.

E. X-Ray:

- I. Interoperability with third-party X-Ray/Imaging software (i.e., RIMI).

F. Laboratory:

1. **Laboratory Information System (LIS):** The system has an LIS or allows for interoperability with third-party LIS (i.e., Relaymed, Orchard, etc.).
2. **Reference Lab:** The system shall interface with reference lab or allows for interoperability with a third-party reference lab (i.e., LabCorp).
3. **In-House Lab Tests:** The system shall interface with in-house lab tests within LIS allowing for results being reported directly into a report template within the EHR.
4. **Lab Manager:** System has a Lab Module/ Lab Manager where lab orders are sent, and lab staff can manage these orders.
5. **Patient Lab Labels:** System allows for different barcode patient ID labels for lab tests and smaller sized labels for lab blood tubes.
6. **Reports:** Report building capability shall exist for laboratory use.
7. **Lab Billing:** System should allow for lab billing capability.
8. **Lab Ordering:** System allows for lab ordering.

G. Reporting & Analytics

1. Reporting:

- a. **Custom reports:** EHR enables custom reports to be created and run in the future, so that reports containing specific information can easily be developed. Confirm and demonstrate no cost accessibility to report template library and data dashboard.
- b. **Ad-Hoc:** The system enables ad-hoc reports to be run so that users can create quick visualizations of information which is not contained in a standard report.
- c. **E-Prescription:** The system has a pre-configured report for e-Prescription information to provider ready visualization of prescriptions. (i.e., Rcopia, Surescripts)
- d. **Computerized physician order entry (CPOE):** The system has pre-configured report for CPOE data.
- e. **Data dashboard:** Patient visits, EMS runs, HPW outreaches, immunizations, KPIs tied into University Goals.
- f. **Revenue Cycle Management (RCM):**
 - Improved workflow across each step of the revenue cycle
 - An improved billing rules intelligence engine with real time responses
 - Increased clarity of task assignment and resolution
 - Improved usability of the platform for patients, physicians, and staff
 - Improved abilities to meet complex and changing interfacing demands across internal and external systems.
 - Transparent and accurate reporting of all metrics of the revenue cycle components, regulatory components, compliance components, and other critical functions (e.g., meaningful use thresholds)
 - Integrated practice management system for patient registration, appointment scheduling, eligibility verification, insurance verification, and benefits tools
 - Individual provider productivity reports provided electronically to both the provider and departments automatically at the end of each month with both current and YTD metrics as defined by the practice plan.
 - Tools to identify and target specific payer and provider challenges with accompanying mitigation solutions.
 - Provide the above in a secure and HIPAA and FERPA compliant manner.
 - Ensure compliance and efficiently address the ICD-10 transition.

H. Interoperability:

1. Integration of the following:

- a. **Billing Systems:** The system can integrate with a billing system to streamline accounts payable and invoicing.
- b. **Lab Orders & Results:** The system can submit lab orders to internal or external labs, receive the results, and display the results for physician and/or patient view.
- c. **Registries – Immunization:** The system can connect to state and/or federal registries to track, record, and submit patient immunizations data.
- d. **Practice Management – Direct:** The system can directly integrate with a Practice Management solution supplied by the same offeror, to provide enhanced electronic medical services.
- e. **Practice Management – 3rd Party:** The system can integrate with a Practice Management solution supplied by another offeror to provide enhanced electronic medical services.
- f. **E-Signature:** The system supports e-Signature tools to enable patients to sign electronic documents.
- g. **APIs:** The system offers an API (Application Programming Interface), WebService, or other means to permit custom integrations with external tools.

2. Data Import and Export:

- a. Data Import – OCR/Paper:** The system supports importing information from scanned paper documents.
- b. Data Import – PDF:** The system supports importing information from PDFs.
- c. Data Import – Clinical Exchange Document:** The system supports importing information from Clinical Exchange Documents for standard patient information exchange.
- d. Data Export – CSV:** The system supports exporting data into CSV format.
- e. Data Export – PDF:** The system supports exporting data into PDF format.
- f. Data Export – Clinical Exchange Document:** The system supports exporting data into Clinical Exchange Documents format.

I. Auxiliary Features:

1. Document Management:

- a. Document Scanning:** The system supports scanning and parsing of physical documents.
- b. Document Uploading & Storage:** The system permits users to upload electronic documents related to patients or other items of interest and then stores the documents for future use and sharing.

2. Audio Tools:

- a. Voice Recognition:** The system includes voice recognition for voice-to-chart, direct dictation, and to simplify physician workflow.
- b. Text-to-Speech:** The system includes text-to-speech to provide audio recitation of system information.
- c. Dictation:** The system supports voice dictation to enable audio notes to be easily recorded.

- 3. Credit Card Processing:** The system can process credit cards for integrated point-of-service payments and/or allows for third-party system integration.

J. Support & Services:

1. User Support:

- a. Phone and Email:** Offeror provides Help Desk support via telephone, teleconference, and email.
- b. Chat and Instant Message:** Offeror provides Help desk support via instant message/chat for ease of live communication.
- c. 24 x 7 Support:** Offeror provides 24 x 7 Help Desk support so that off-hours issues can be addressed.
- d. Personal Account Representative(s):** Offeror provides a personal account representative(s) for site specific questions.

2. Consulting & Professional Services:

- a. Implementation Services:** Offeror provides software implementation services including system evaluation and installation to minimize the on-premises expertise required to implement the solution.
- b. Training:** Offeror provides comprehensive training sessions for our staff members. Training should cover system navigation, data entry, reporting, and best practices using system. Training will be provided for system administrators who are responsible for user management, system configuration, and troubleshooting.

III. Technical Requirements:

A. Technical Features:

1. Compliance & Certifications

- a. **FERPA:** The system is complaint with FERPA regulations.
- b. **HIPAA:** The system is compliant with HIPAA regulations.
- c. **ONC-ATCB:** The system has been certified by the ONC-Authorized Testing and Certification Bodies (ONC-ATCB) to verify that it is compliance with the standards, implementation specifications, and certification criteria adopted by U.S. Department of Health and Human Services (HHS) Secretary and meet the definition of certified EHR technology.
- d. **HITECH:** The EHR software and all third-party applications (if applicable) has/have been certified to be compliant with the Health Information Technology for Economic and Clinical Health (HITECH) Act of 2009.
- e. **Meaningful Use:** The EHR software has been certified to meet “Meaningful Use” requirements.
- f. **HECVAT:** Offerors will need to submit full HECVAT electronically. HECVAT will be required for any third-party applications that will be part of the EHR system.

2. Coding Support

- a. **ICD-10 Support:** The system supports ICD-10 codes for medical classifications.
- b. **DSM-5 Support:** The system supports the latest DSM-5 codes for mental disorder classification.
- c. **CPT Support:** The system supports Current Procedural Terminology (CPT) codes for reporting medical procedures and services to entities such as physicians, health insurance companies and accreditation organizations.
- d. **Mobile Device Support:** System supports mobile devices (i.e., tablets).
- e. **Mobile Web App:** The system provides a web app formatted for mobile use for operating system agnostic mobile interaction.
- f. **Native App:** The system provides native mobile apps (iOS, Android, etc.) to take advantage of advanced mobile device features such as geotagging.

3. Architectural Features:

- a. Deployment Environment
- b. Hosted Installation: The system is available in a hosted, Software as a Service (Saas) offering.

4. Security

- a. **Audit Trail:** the system can log administrative and user actions, and report on the logged items.
- b. **Encryption - Storage:** The system provides encryption capabilities for stored data to ensure that data-at-rest is protected.
- c. **Encryption – Transmission:** The system provides encryption capabilities for the transmission of data to ensure that in-transit information is secure.
- d. **Access Control:** The system enables user and/or role-based permissions to be configured to control what system features and data users can access.
- e. **Access Control – Lockout Users:** The system can lock out specific users in instances such as employee termination or account in collections, so that the users cannot access the system.
- f. System must support URI Single Sign-On (SSO)
- g. **Data Storage:** Data sorted in US Regions only.
- h. Data for the system is encrypted in transit and at rest - DLP for theft and snooping.

- i. All software complies with the Higher Education Community Offeror Assessment Tool (HECVAT).
 - j. System has immutable backups in place - protection against ransomware.
- 5. Fault Tolerance**
- a. **Backups and Snapshots:** The system provides tools to aid in creating routine data backups and point-in-time snapshots to protect against data loss. Ability to have our backups sent directly to us.
 - b. **Data Restoration:** The system provides tools to aid in restoring system data from a backup or snapshot to facilitate recovery.
- 6. Availability & Scalability**
- a. **Scalability:** The system can easily scale to support changing throughput.
 - b. **High Availability:** The system provides for high availability through means such as redundant backup servers, cloud nodes, or other methods.

SECTION 4: PROPOSAL

A. Technical Proposal

URI will establish a technical review committee (TRC) to evaluate submitted vendor proposals related to this RFP. The proposals will be evaluated by the TRC in two phases. In Phase 1, the TEC will evaluate the written proposals. Proposals that meet the minimum scoring threshold for Phase 1 (described further below) will advance to Phase 2. In Phase 2, URI will require selected vendors to provide a presentation/demonstration of their proposed system. Phase 2 will be evaluated accordingly.

Narrative and format: The proposal should address specifically each of the following elements:

I. Capability, Capacity, and Qualifications of the Offeror - Present the qualifications and credentials of key personnel involved in delivering services. Include resumes of key staff involved. Provide an overview of your company/organization, including its history, size, experience in providing IT healthcare software solutions/systems, and any relevant certifications and/or accreditations. Submit five client references. Each reference should contain primary contact name, title, phone number, email address, mailing address, dates of service and type(s) of service(s) provided.

II. Technical and Function Specifications Evaluation - Provide responses to the RFP's Scope of Work and Requirements (Section 3). In addition to these requirements, other factors to be evaluated will include any value-added services/attributes and interoperability with third-party software offerors. These are any competitive advantages, efficiencies, and optional services distinct from the stated scope of work and requirements section.

III. Work Plan – Provide a detailed account of your implementation strategy including responsibilities of necessary resources from URI with assigned tasks with at least the minimum activity level, start and end dates, and defined level of effort. Work plan will include:

- **Detailed timelines** (projected start and end dates) for implementation of services in the following phases:
 - Phase 1 Planning and Preparation

- Phase 2 Implementation and Deployment
- Phase 3 Testing and Quality Assurance
- Phase 4 Training and Transition
- Phase 5 Project Closure and Evaluation
- **List key milestones and deliverables** (important events or deliverables that mark progress) within each phase including:
 - Projected project kickoff date
 - Projected data migration date
 - Projected system installation date
 - Projected user acceptance testing date
 - Projected go-live date
 - Projected project closure report date
- **Task description:** outline the specific tasks to be performed within each project phase. Include details such as who is responsible for each task and any dependencies between tasks. For example:
 - Phase 1: Planning and Preparation 1.
 - Task 1: Project kickoff - Responsible: [e.g., Project Manager] - Description: Organize a project kickoff meeting to introduce key stakeholders, establish project objectives and define roles and responsibilities.
 - Task 2: Requirements gathering- Responsible [e.g., Business Analyst] – Description: Gather and document detailed project requirements, including functional and technical specifications.
- **Reporting and communication:** Outline the reporting and communication expectations, including regular progress updates, meetings, and contact points.
- **Acceptance criteria:** Specify the criteria for each phase to be considered complete.
-

B. Cost Proposal

Provide a proposal cost proposal to include the following

- I. The offeror shall bear, as its sole risk and responsibility, any costs that arise from preparation of the response to this solicitation.
- II. The University will not provide compensation to offeror for any expenses incurred for proposal preparation or for demonstrations or oral presentations that may be made by offeror. Offeror submits its proposal at its own risk and expense.
- III. Proposals should be prepared simply and economically, providing a straightforward, concise description of offeror's ability to meet the requirements and specifications of this RFP. Emphasis should be on completeness, clarity of content, and responsiveness to the requirements and specifications of this RFP. All costs will be in US Dollars.
- IV. The cost proposal should include the following:
 - **Total Cost of EHR System:** Proposer shall include, for the initial contract period (three years), a **detailed proposal** that provides the total annual cost to the University for each contract year. Proposals should include, but are not limited to cost details for the Initial Setup and Implementation (i.e., software licensing, data migration and conversion, integration and implementation, and training expenses),

Recurring Costs (i.e., licensing fees, maintenance and support, hosting/cloud services, data storage, software upgrades and updates, user support services), and Additional Costs (i.e., customization/modification, consultation/professional services, other related service charges). If travel and/or lodging is not included in the proposed amounts, provide the expected cost to the University over the course of the entire proposal. If annual fees are not fixed, include the expected yearly increase.

- **Cost for Additional Service Periods:** Offeror shall provide the total cost for each additional option period (years four and five).
- **Cost of System Updates:** Offeror shall provide total annual costs for system updates.
- **Long Term System Costs:** Offeror shall provide cost detail, if any, of annual licensing fees, system service and maintenance, ongoing training and support training for the initial contract period as well as any cost for additional service periods not detailed above.
- **Cost Escalators:** Offeror shall provide cost details, if applicable, for any standard annual cost escalators or projected cost increases.

C. ISBE Proposal

See Appendix A for information and the MBE, WBE, and/or Disability Business Enterprise Participation Plan form(s). Bidders are required to complete, sign and submit these forms with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.

SECTION 5: EVALUATION AND SELECTION

Proposals will be reviewed by a Technical Review Committee (“TRC”) comprised of staff from URI/State Agencies. The TRC first shall consider technical proposals.

The evaluation of Technical Proposals will be split into two phases, the first phase will be the review and scoring of the Written Technical Proposal by the TRC, the second phase will be the scoring of the Presentation and Demonstration of the Product and/or Services offered.

In Phase 1, the TRC will score submitted written proposals. Proposals that meet or exceed a minimum threshold of 30 out of a maximum of 40 points to advance to the cost evaluation phase. Any technical proposals scoring less than 30 points shall be disqualified.

In Phase 2, URI will require selected vendors to schedule a presentation/demonstration with the TRC and score the product and/or services accordingly.

Following the scoring of Phase 2, points for Phase 1 and 2 will be combined. Technical proposals scoring 50 points or higher will have the cost proposals evaluated and assigned up to a maximum of 30 points in cost category bringing the total potential evaluation score to 100 points. After total possible evaluation points are determined ISBE proposals shall be evaluated and assigned up to 6 bonus points for ISBE participation.

The University of Rhode Island reserves the right to select the vendor(s) or firm(s) (“vendor”) that it deems to be most qualified to provide the goods and/or services as specified herein; and, conversely, reserves the right to cancel the solicitation in its entirety in its sole discretion.

Proposals shall be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Phase 1: Evaluation of the Written Proposal	
Capability, Capacity, and Qualifications of the Offeror	5 Points
Technical and Function Specifications Evaluation	20 Points
Work Plan	15 Points
	Points
Total Possible points for Phase 1	40 Points
Phase 2: Presentation and Demonstration	
Demonstration of Technical and Functional aspects of the EHR system to the TRC and selected leadership members in Health Services, Counseling Center, and the PCC.	30 Points
Total Possible Technical Points	70 Points
Cost proposal*	30 Points
Total Possible Evaluation Points	100 Points
ISBE Participation**	6 Bonus Points
Total Possible Points	106 Points

*** Cost Proposal Evaluation:**

The vendor with the lowest cost proposal shall receive one hundred percent (100%) of the available points for cost. All other vendors shall be awarded cost points based upon the following formula:

$$(\text{lowest cost proposal} / \text{vendor's cost proposal}) \times \text{available points}$$

For example: If the vendor with the lowest cost proposal (Vendor A) bids \$65,000 and Vendor B bids \$100,000 for monthly costs and service fees and the total points available are thirty (30), Vendor B's cost points are calculated as follows:

$$\$65,000 / \$100,000 \times 30 = 19.5$$

****ISBE Participation Evaluation:**

A. Calculation of ISBE Participation Rate

1. **ISBE Participation Rate for Non-ISBE Vendors.** The ISBE participation rate for non-ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of non-ISBE vendor's total contract price that will be subcontracted to ISBEs by the non-ISBE vendor's total contract price. For example if the non-ISBE's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs, the non-ISBE's ISBE participation rate would be 12%.
2. **ISBE Participation Rate for ISBE Vendors.** The ISBE participation rate for ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of the ISBE vendor's total contract price that will be subcontracted to ISBEs and the amount that will be self-performed by the ISBE vendor by the ISBE vendor's total contract price. For example if the ISBE vendor's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs and will perform a total of \$8,000.00 of the work itself, the ISBE vendor's ISBE participation rate would be 20%.

B. Points for ISBE Participation Rate:

The vendor with the highest ISBE participation rate shall receive the maximum ISBE participation points. All other vendors shall receive ISBE participation points by applying the following formula:

$$(\text{Vendor's ISBE participation rate} \div \text{Highest ISBE participation rate})$$

$$\times \text{Maximum ISBE participation points})$$

For example, assuming the weight given by the RFP to ISBE participation is 6 points, if Vendor A has the highest ISBE participation rate at 20% and Vendor B's ISBE participation rate is 12%, Vendor A will receive the maximum 6 points and Vendor B will receive $(12\% \div 20\%) \times 6$ which equals 3.6 points.

General Evaluation:

Points shall be assigned based on the vendor's clear demonstration of the ability to provide the requested goods and/or services. Vendors may be required to submit additional written information or be asked to make an oral presentation before the Technical Review Committee to clarify statements made in the proposal.




SECTION 6: QUESTIONS

Questions concerning this solicitation may be e-mailed to the University of Rhode Island Purchasing Department at URIPurchasing@uri.edu no later than the time and date indicated on page 1 of this

solicitation. Please reference the reference **RFP Number # indicated on the cover sheet** on all correspondence. Questions should be submitted in a Microsoft Word attachment in a narrative format with no tables. Answers to questions received, if any, shall be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to monitor the Division of Purchases website for any procurement related postings such as addenda. If technical assistance is required, call the Help Desk at (401) 574-8100.

SECTION 7: PROPOSAL CONTENTS

A. Proposals shall include the following:

1. One completed and signed **URI Bidder Certification Cover Form** (include in the Technical Proposal Original copy only). *Do not include in the Technical Proposal copies or Cost proposals.*
2.  **Technical Proposal** - describing the qualifications and background of the applicant and experience with and for similar projects, and all information described earlier in this solicitation. The technical proposal should be limited to no more than twenty pages (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request).
 - a. One (1) Electronic copy on a CD-R or USB, marked "Technical Proposal - Original".
 - b. One (1) printed paper copy, marked "Technical Proposal -Original" and signed.
 - c. One (1) printed paper copies
3.  **Cost Proposal** - A *separate*, signed and sealed cost proposal reflecting the requirements stated in Section 4, Part B Cost Proposal. The Cost Proposal should be no more than eight pages. Section should combine both narrative text and use either a spreadsheet or table to delineate costs over duration of project.
 - a. One (1) Electronic copy on a CD-R or USB, marked "Cost Proposal - Original".
 - b. One (1) printed paper copy, marked "Cost Proposal -Original" and signed.
4.  **ISBE Proposal** – A *separate*, signed and sealed Appendix A MBE, WBE, and/or Disability Business Enterprise Participation Plan. Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation. **Do not include any copies in the Technical proposals.**
5. **Higher Education Cloud Offeror Assessment Tool (HECVAT)** –

- a. One (1) Electronic copy on a USB, marked “HECVAT”

B. Formatting of proposal response contents should consist of the following:

1. Formatting of CD-Rs or USBs – Separate CD-Rs or USBs are required for the technical proposal and cost proposal. All CD-Rs and USBs submitted must be labeled with:
 - a. Vendor’s name
 - b. RFP #
 - c. RFP Title
 - d. Proposal type (e.g., technical proposal or cost proposal)
 - e. If file sizes require more than one CD-R or USB, multiple CD-Rs or USBs are acceptable. Each CD-R or USB must include the above labeling and additional labeling of how many CD-Rs or USBs should be accounted for (e.g., 3 CD-Rs or USBs are submitted for a technical proposal and each CD-R or USB should have additional label of ‘1 of 3’ on first CD-R or USB, ‘2 of 3’ on second CD-R or USB ‘3 of 3’ etc.).

Vendors are responsible for testing their CD-Rs or USBs before submission as the URI Purchasing Department’s inability to open or read a CD-R or USB may be grounds for rejection of a Vendor’s proposal. All files should be readable and readily accessible on the CD-Rs or USBs submitted with no instructions to download files from any external resource(s). If a file is partial, corrupt or unreadable, the URI Purchasing Department may consider it “non-responsive”. Please note that CD-Rs and USBs submitted, shall not be returned.

2. Formatting of written documents and printed copies:

- a. For clarity, the technical proposal shall be typed. These documents shall be single-spaced with 1” margins on white 8.5”x 11” paper using a font of 12 point Calibri or 12 point Times New Roman. Responses should be appropriate and to the point while still providing all requesting documents and information.
- b. All pages on the technical proposal are to be sequentially numbered in the footer, starting with number 1 on the first page of the narrative (this does not include the cover page or table of contents) through to the end, including all forms and attachments. The Vendor’s name should appear on every page, including attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to.
- c. The cost proposal shall be typed using either a spreadsheet or table format so that costs and time periods are easily delineated.
- d. Printed copies are to be only bound with removable binder clips.

SECTION 8: PROPOSAL SUBMISSION

Interested vendors must submit proposals to provide the goods and/or services covered by this RFP on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the University of Rhode Island Purchasing Department, shall not be accepted.

Responses should be mailed or hand-delivered in a sealed envelope marked "RFP # (as indicated on the cover sheet) to

MAIL TO:

UNIVERSITY OF RHODE ISLAND
PO BOX 1773
PURCHASING DEPARTMENT
KINGSTON, RI 02881

COURIER:

UNIVERSITY OF RHODE ISLAND
PURCHASING DEPARTMENT
10 TOOTELL RD.
KINGSTON, RI 02881-2010

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other University locations or which are otherwise not presented in the URI Purchasing Department by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the URI Purchasing Department will not be considered. The "official" time clock is located in the reception area of the URI Purchasing Department. **(Please be advised that FedEx/UPS do not always arrive by 10:30 am, you would be smart to send your submission to arrive at least one day early)**

SECTION 9: CONCLUDING STATEMENTS

Notwithstanding the above, the University of Rhode Island reserves the right to award on the basis of cost alone, to accept or reject any or all proposals, and to award it in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The University may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award.

If a Vendor is selected for an award, no work is to commence until a purchase order is issued by the University of Rhode Island Purchasing Department.

The General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded for this RFP and can be found in the attached Bidder Certification Form.

APPENDIX A. PROPOSER ISBE RESPONSIBILITIES AND MBE, WBE, AND/OR DISABILITY BUSINESS ENTERPRISE PARTICIPATION FORM

A. Proposer's ISBE Responsibilities (from 150-RICR-90-10-1.7.E)

1. Proposal of ISBE Participation Rate. Unless otherwise indicated in the RFP, a Proposer must submit its proposed ISBE Participation Rate in a sealed envelope or via sealed electronic submission at the time it submits its proposed total contract price. The Proposer shall be responsible for completing and submitting all standard forms adopted pursuant to 105-RICR-90-10-1.9 and submitting all substantiating documentation as reasonably requested by either the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to the names and contact information of all proposed subcontractors and the dollar amounts that correspond with each proposed subcontract.
2. Failure to Submit ISBE Participation Rate. Any Proposer that fails to submit a proposed ISBE Participation Rate or any requested substantiating documentation in a timely manner shall receive zero (0) ISBE participation points.
3. Execution of Proposed ISBE Participation Rate. Proposers shall be evaluated and scored based on the amounts and rates submitted in their proposals. If awarded the contract, Proposers shall be required to achieve their proposed ISBE Participation Rates. During the life of the contract, the Proposer shall be responsible for submitting all substantiating documentation as reasonably requested by the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to copies of purchase orders, subcontracts, and cancelled checks.
4. Change Orders. If during the life of the contract, a change order is issued by the Division, the Proposer shall notify the ODEO of the change as soon as reasonably possible. Proposers are required to achieve their proposed ISBE Participation Rates on any change order amounts.
5. Notice of Change to Proposed ISBE Participation Rate. If during the life of the contract, the Proposer becomes aware that it will be unable to achieve its proposed ISBE Participation Rate, it must notify the Division and ODEO as soon as reasonably possible. The Division, in consultation with ODEO and Governor's Commission on Disabilities, and the Proposer may agree to a modified ISBE Participation Rate provided that the change in circumstances was beyond the control of the Proposer or the direct result of an unanticipated reduction in the overall total project cost.

B. MBE, WBE, AND/OR Disability Business Enterprise Participation Plan Form:

Attached is the MBE, WBE, and/or Disability Business Enterprise Participation Plan form. Bidders are required to complete, sign and submit with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.



**STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS
DEPARTMENT OF ADMINISTRATION
ONE CAPITOL HILL PROVIDENCE,
RHODE ISLAND 02908**

MBE, WBE, and/or DISABILITY BUSINESS ENTERPRISE PARTICIPATION PLAN					
Bidder's Name:					
Bidder's Address:					
Point of Contact:					
Telephone:					
Email:					
Solicitation No.:					
Project Name:					
<p>This form is intended to capture commitments between the prime contractor/vendor and MBE/WBE and/or Disability Business Enterprise subcontractors and suppliers, including a description of the work to be performed and the percentage of the work as submitted to the prime contractor/vendor. Please note that all MBE/WBE subcontractors/suppliers must be certified by the Office of Diversity, Equity and Opportunity MBE Compliance Office and all Disability Business Enterprises must be certified by the Governor's Commission on Disabilities at time of bid, and that MBE/WBE and Disability Business Enterprise subcontractors must self-perform 100% of the work or subcontract to another RI certified MBE in order to receive participation credit. Vendors may count 60% of expenditures for materials and supplies obtained from an MBE certified as a regular dealer/supplier, and 100% of such expenditures obtained from an MBE certified as a manufacturer. This form must be completed in its entirety and submitted at time of bid. Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.</p>					
Name of Subcontractor/Supplier:					
Type of RI Certification:		<input type="checkbox"/> MBE <input type="checkbox"/> WBE <input type="checkbox"/> Disability Business Enterprise			
Address:					
Point of Contact:					
Telephone:					
Email:					
Detailed Description of Work To Be Performed by Subcontractor or Materials to be Supplied by Supplier:					
Total Contract Value (\$):			Subcontract Value (\$):		ISBE Participation Rate (%):
Anticipated Date of Performance:					
I certify under penalty of perjury that the forgoing statements are true and correct.					
Prime Contractor/Vendor Signature			Title		Date
Subcontractor/Supplier Signature			Title		Date

MAW/Disability Business Enterprise Utilization Plan - DEPs - Rev. 5/24/2017