



## Request for Proposals (RFP):

Faculty and Advisors for NACHC's Financial Operations Management  
Trainings and Technical Assistance

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RFP Released: July 14, 2020

Proposals Due: August 4, 2020

### Points of Contact

Training and Technical Assistance Department, NACHC - Phone: (301) 347-0400

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## **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 and technical assistance to support and strengthen health center operations, clinical quality, leadership development and governing Boards of Directors at health centers across the country.
- Develops partnerships with the public and private sectors to build stronger and healthier communities.

## **Purpose**

The NACHC Training and Technical Assistance (TTA) Program 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 delivery venues, the NACHC TTA Program is highly utilized and well prepared to respond to emerging healthcare delivery issues. Specifically, NACHC maintains a professional cadre of experts 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) provides resource support to NACHC to improve health center operational and clinical outcomes through the provision of coordinated, collaborative TTA. The purpose of this RFP is to develop a diverse and expansive list of faculty, advisors, and experts in financial operations management of health care systems and operations for NACHC’s training and technical assistance.

## **RFP Services Desired**

Through this Request for Proposal (RFP), NACHC is seeking qualified organizations and/or individuals with health center finance operations, advisement and/or faculty expertise.

Selected vendor(s) will work in close coordination with the NACHC activity lead to develop and deliver virtual or in-person workshop sessions as part of NACHC’s standard financial operations management trainings and/or other financially-focused training, and provide direct technical assistance to health centers, primary care associations, health center controlled network or other stakeholders as identified by the NACHC staff lead. NACHC seeks experienced subject matter experts and innovative trainers steeped in the understanding of Section 330 of the Public Health Service Act and experienced in the provision of financial operations, the delivery of senior leadership and management of governance implications of the Health Center Program Requirements and HRSA’s Health Center Program Compliance Manual.

NACHC's financial operations management trainings may occur during July 2020 to June 2021, dates and delivery will be negotiated after the vendor is selected. The trainings will be developed in partnership with NACHC's lead staff, responsible for content planning. NACHC staff will be on-site/online to assist with the overall delivery all trainings.

The trainings are envisioned as intense content and networking workshops geared toward health center mid-level managers and C-suite leaders. Training events must enhance the learner's abilities and understanding of the financial and regulatory aspects of operating a community health center, rooted in core competencies necessary for financial leaders in a health center setting. Each workshop will be designed to facilitate health center staff learning and knowledge growth through highly relevant content presented via engaging instructional design from subject matter experts and health center peers/colleagues.

The objectives for NACHC's financial operations trainings are rooted in core competencies which:

- Improve operations to maximize revenue
- Review the key business aspects of an efficiently run health center
- Leverage technology to produce information to guide better decisions
- Distinguish between the concepts of leadership and management, explaining how both are necessary to drive operational and strategic performance
- Describe the key drivers of profitability in a health center

Additional training and/or technical assistance resources may be developed to address financially related implications of COVID-19, considerations for boards of Directors related to financial oversight given COVID-19 and the changing environment, among other issues. Expertise in how to communicate financial information to a board and training boards on financial oversight is desired.

This RFP is distributed to vendors who have demonstrated qualifications, through a recent NACHC Request for Information (RFI), which include: a background in health care service delivery, health center operations, change management, the use of data to develop and scale operational efficiencies, and the development of teams to facilitate effective financial operations.

Deliverables include the development and delivery of the sessions and/or products described below.

Note: Organizations or individuals submitting responses to this RFP may apply for single or multiple sessions and/or products described below.

Joint applications/proposals by a team of unique and independent consultants/organizations are permitted. If submitting a joint submission, please denote individual trainer costs in the budget template.

## **Time Period**

**Time period for services is August 10, 2020 through June 30, 2023.** Vendor(s) may be retained for this multi-year period of service, based upon successful performance during period of initial service (contract year ending June 30, 2021) and on-going availability of funds.

## **Scope of Work and Deliverables**

### **Content Area: Financial Management**

Selected vendor(s) will support NACHC staff in developing and/or delivering a training to improve health center performance by understanding the core competencies needed to manage the business aspects of financial operations, team management, and service delivery. Responsibilities include creating training based on adult learning principles that help attendees understand basic concepts of performance improvement framework, apply them to FQHC setting and measure their progress.

#### Deliverables:

- Nine modules (see below)– ranging in length from 60-120 minutes suitable for virtual or in-person delivery—including topics such as, health center finance, operating a finance department, budgeting and profitability, reporting, provider and team incentive compensation. Examples and case studies should highlight efforts to improve financial process and reporting, and strategies to improve financial outcomes. Interactive sessions must include case studies and a review of operational tools.

Financial Management	As part of the financial trainings, NACHC offers sessions/modules on topics: <ul style="list-style-type: none"><li>• Financial management in a health center setting</li><li>• Staffing a health center finance department</li><li>• Reporting financial information: accountability and frequency</li><li>• Information technology (IT) structure for effective reporting</li><li>• Developing internal and external benchmarks</li><li>• Data Analytics</li><li>• Internal Controls</li><li>• Budgeting</li><li>• Provider and Team Incentive Plans</li></ul>
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### **Content Area: Section 330 Grants Management, Audit, Medicare Cost Report**

Selected vendor(s) will support NACHC staff in developing and/or delivering a training to improve health center performance with an in-depth focus on managing the Section 330 health center grants, elements of scope of services, budgeting and reporting at health centers. Responsibilities include creating training based on adult learning principles that help attendees understand change management processes, fostering change in as a FQHC leader and creating a continuous quality improvement culture to maintain new efficiencies. CPA firm required.

#### Deliverables

- 7 modules (see below) – ranging in length from 60-120 minutes suitable for virtual or in-person delivery. The sessions will include a practical discussion on how and what data to measure and report for both federal compliance and for successful decision-making. Interactive sessions must include case studies and a review of operational tools.

Audit/ Section 330 Grant Management	As part of the financial trainings, NACHC offers sessions/modules on topics: <ul style="list-style-type: none"> <li>• 330 grant budgeting</li> <li>• Federal Financial Report</li> <li>• Federal Grants Management</li> <li>• 330 Grant Scope of Services</li> <li>• 340B Financial Management</li> <li>• Uniform Administrative Requirements</li> <li>• Medicare Cost Report</li> </ul>
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**Content Area: Corporate and Revenue Cycle Compliance**

Selected vendor(s) will support NACHC staff in developing and/or delivering a training to improve health center performance in accountability for compliance, the elements of an effective strategy for maintaining compliance, and the tools for managing the implementation of a compliance program.

Deliverables

- Two modules (see below) – ranging in length from 60-120 minutes suitable for virtual and in-person delivery. Interactive sessions must include case studies and a review of operational tools.

Financial Elements of Corporate Compliance	As part of the financial trainings, NACHC offers sessions/modules on topics: <ul style="list-style-type: none"> <li>• Elements of a revenue cycle compliance plan</li> <li>• How to make your corporate compliance plan operational</li> </ul>
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**Content Area: Advanced Grants Management with Specialized Technical Assistance**

Selected vendor(s) will support NACHC staff in developing and/or delivering training to improve health center performance in the area of grants management and reporting for CARES Act and Provider Relief funds. In addition to training, direct technical assistance may be required to health center cohorts, and case studies will be developed based on the findings from direct technical support.

Deliverables

- Three virtual modules (see below) – ranging in length from 60-120 minutes suitable for virtual and in-person delivery. Interactive sessions must include case studies and a review of financial tools.

Advance Grants Management	<p>As part of the financial trainings, NACHC offers sessions/modules on topics:</p> <ul style="list-style-type: none"> <li>• Grants guidance for the H8C, H8D and H8E funds</li> <li>• Grants guidance for CAREs Act</li> <li>• Direct technical assistance for at least 10 health centers performing a grants management review resulting in case studies or profiles for broader educational purposes</li> </ul>
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### **Content Area: Emerging Financial Issues**

Selected vendor(s) will support NACHC staff in developing and/or delivering training and/or technical assistance products to improve health center performance related to emerging and evolving issues such as ongoing financially related implications of COVID-19, considerations for boards and health center leaders related to financial oversight connected to COVID-19, telehealth reimbursement, non-traditional financing programs (ie: Small Business Administration;/), organizational restructuring (mergers/acquisitions), aspects of business continuity planning and other issues relative to the changing operational environment

Deliverables are TBD based on need determined by NACHC and negotiated with selected vendor(s).

### **Information Requested**

Proposals must be submitted using NACHC’s web-based portal by **August 4<sup>th</sup>, 2020, 11:59 pm PT (i.e. August 5<sup>th</sup>, 2:59 am ET)**. The system will notify you upon your successful submission into the portal. Incomplete proposals will not be considered. If NACHC selects your proposal, you will be notified by or before **August 14, 2020**.

Online Submission Portal: [https://nachc.co1.qualtrics.com/jfe/form/SV\\_0B8xlxaI6ErTWaF](https://nachc.co1.qualtrics.com/jfe/form/SV_0B8xlxaI6ErTWaF)

Proposals must contain the below items, which are evaluated based on the specific criteria outlined in the Evaluation table below.

- **Point of Contact Information**
- **Name / Description of Organization**
- **Capability Statement\***
- **Education and Experience\***
- **Quality of Work Samples\***
- **Daily and Hourly Rates**
- **Training Outline and Proposed Timeline**
- **Signed Statement** (see below)

\* For qualified vendor(s) who have previously responded to NACHC’s RFI, you may indicate in your response to this RFP if you prefer NACHC to utilize your previously submitted item(s) which are on file. These item(s) are marked with an asterisk.

## **ATTESTATION**

By my signature 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 my electronic signature is the legal equivalent of my manual signature on this application. By typing my name below, I certify that the information provided in the application is true and accurate.

**Print Name:**

**Title:**

**Organization:**

**Signature:**

**Date:**

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## **Evaluation Criteria**

Complete proposals will be evaluated using the criteria below.

<b>Rating Factor</b>	<b>Application Selection Criteria To earn full points in each domain, the applicant must demonstrate:</b>	<b>Points</b>
<b>Capability Statement*</b>	Capability statement that demonstrates ability to deliver technical skills and/or subject matter expertise. Please ensure that statement addresses your ability to work with others and collaborate.  Page Limit for Capability Statement: 2 pages per focus area	25
<b>Experience &amp; Education*</b>	Resume(s)/CV(s) of expert(s) / staff clearly show tenure, professional experience, and/or education that reflects knowledge and ability in content expertise and training. Submitted documents should reflect expertise in all areas in which that applicant has proposed qualification for.  Page Limit for Resume(s) / CV(s): 2 pages per key expert / staff	25
<b>Quality of Work Samples*</b>	Work samples must demonstrate understanding of SME areas as described in this RFP. Where appropriate, understanding of adult learning needs and content knowledge should be evident.  Work samples required in this RFP include: <ul style="list-style-type: none"> <li>• Sample presentation(s), supplementary training product(s), and/or publications developed and delivered by vendor that demonstrates understanding of the specific SME area, as described in this RFP.</li> </ul>	25

	<ul style="list-style-type: none"> <li>Past client evaluations, reference letters, and/or testimonials demonstrating quantitative and/or qualitative feedback from at least two audiences, clients, or engagements occurring within a year of RFP application date.</li> </ul> <p>Page Limit for sample presentation(s), supplementary training product(s), and/or publications: 20 pages per each SME area applicant applied to</p> <p>Page Limit for past client evaluation(s), reference letter(s), and/or testimonial(s): 10 pages limit</p>	
<b>Daily and Hourly Rates</b>	<p>Daily and Hourly Rates for all expert(s) and staff that may be engaged in work are reasonable. Rates should reflect overall cost rate inclusive of any fringe, overhead and/or general &amp; administrative expense (G&amp;A), if required.</p> <ul style="list-style-type: none"> <li>“Reasonableness” is assessed based on market or industry standards and in consideration of the not-for-profit status of health centers and NACHC.</li> </ul>	10
<b>Training Outline and Proposed Timeline</b>	<p>Reflects an understanding of course objectives and chosen content area such that outline proposed activities/presentations relevant to the audience and applicable to health center setting.</p> <p>Timeline and project management plan for meeting deliverables and required timeline.</p> <p>Page limit for Proposed Timeline: 3 pages</p> <p>Page limit of Training Outline: 5 pages per focus area</p>	15
<b>Total</b>		100



## **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.