



Request for Proposals (RFP)

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

RFP Released: May 18, 2023

Proposals Due: June 4, 2023

Points of Contact

Subject Matter Content Inquiries: Gervean Williams (gwilliams@nachc.org)

Submission Process Inquiries: Latisha Harley (lharry@nachc.org)

Organization Overview

The [National Association of Community Health Centers](#) (NACHC) is a national organization supporting federally qualified health centers and federally qualified health center look-alike organizations (also known as FQHCs or Community Health Centers) and expanding health care services for the medically underserved and uninsured. Founded in 1971 to promote efficient, high-quality, comprehensive health care that is accessible, culturally and linguistically competent, community-directed, and patient-centered for all, NACHC's mission and [strategic pillars](#) continue to guide our values and priorities as an organization representing a national health center movement.

Background

As a trusted resource, NACHC delivers training and technical assistance (TTA) to preserve, strengthen, and expand the health center movement by assisting existing and potential FQHCs in addressing clinical and operational demands. In addition, NACHC empowers health center professionals with strategies and best practices by maintaining a cadre of practitioners and subject matter experts who provide quality educational instruction and technical assistance utilizing adult learning principles, advanced instructional design, and the understanding and application of technology to advance learning and engagement.

Some of our vendor opportunities are supported by the U.S. Health Resources and Services Administration (HRSA) Bureau of Primary Health Care (BPHC) to improve existing and potential FQHCs operational and clinical outcomes through the provision of coordinated, collaborative TTA. NACHC seeks experienced and innovative professionals knowledgeable of Section 330 of the Public Health Service Act, as well as the leadership and operational implications of the BPHC Compliance Manual and Health Center Program Requirements.

RFP Services Desired

As part of NACHC’s portfolio of services offered through its National Training and Technical Assistance Program (NTTAP) funded by HRSA, NACHC seeks qualified organizations and/or individuals to serve as finance faculty.

Through this RFP, NACHC seeks to develop a diverse and expansive list of faculty, advisors, and experts. Selected vendor(s) will work in close coordination with the NACHC staff lead/team to develop and deliver virtual, hybrid or in-person workshop sessions as part of NACHC’s finance trainings and/or provide direct technical assistance to health centers or other stakeholders as identified by the NACHC lead/team. Subject matter experts and trainers must have a thorough understanding of Section 330 of the Public Health Service Act and experienced in the provision of financial operations, senior leadership, and governance implications of the Health Center Program Requirements and HRSA’s Health Center Program Compliance Manual.

The objectives for NACHC’s financial operations trainings are to:

- Improve health center operations to maximize revenue.
- Review the key business aspects of an efficiently managed health center.
- Leverage technology to produce data and information to make better decisions.
- Distinguish the roles between leadership and management and explain how both are necessary to drive operational and strategic performance within a health center.
- Describe the key drivers of profitability in a health center.

NACHC’s finance trainings will occur between July 2023 to June 2024. Vendor deliverables include the development and delivery of tailored sessions and stand-alone training events. Training events may be offered as a “stand-alone” or concurrent within the various training content areas (refer to “Scope of Work & Deliverables” section). Training events will include interactive presentations that may require vendor(s) to provide supporting resources (i.e., case studies, operational tools, etc.). NACHC is responsible for content planning and will develop trainings in partnership with the selected vendor(s). In addition, NACHC staff will be on-site/online to assist with the overall delivery of all trainings, virtual, hybrid or in-person.

2023 National Workshops Training Schedule:

Trainings (National Workshops)	Dates	Delivery Method
Introduction of Community Health Center	Dates TBD	Hybrid
Financial Operations Management Seminar Level I (FOM I)	Dates TBD	Hybrid
Financial Operations Management Seminar Level II (FOM II)	Dates TBD	Hybrid
Financial Operations Management Seminar Level III (FOM III)	Dates TBD	Hybrid
Revenue Cycle 360	Dates TBD	In Person Only
Revenue Cycle Learning Collaborative	Dates TBD	TBD

Time Period

Time period for services is July 1, 2023, through June 30, 2024. Vendor(s) may be retained for a multi-year period of service through (June 30, 2026), based upon successful performance during the period of initial service (contract year ending June 30, 2024) and on-going availability of funds.

Funding & Budget Information

Probable Funding Source: Health Resources Service Administration (HRSA)

Vendor(s) must provide a comprehensive budget based on the ideal methodology and process used to meet the desired services, scope of work, and deliverables. All costs must be itemized into the appropriate budget categories (i.e., direct cost, indirect cost, materials, travel, etc.) and directly relate to the project activities described in the RFP. Budget negotiations may occur.

Scope of Work & Deliverables

Organizations or individuals submitting responses to this RFP may apply for single or multiple training content areas described below.

Training Content Area: Financial Management

Scope of Work: Under this content area, selected vendor(s) will support NACHC in developing trainings that improve health center performance in understanding the core competencies needed to approach the business aspects of financial operations, management, and service delivery. The vendor(s) responsibilities may include creating trainings based on adult learning principles to aid participants in understanding the basic concepts of the performance improvement framework, applying this concept in the FQHC setting, and measuring progress.

Deliverables: Under this content area, NACHC will develop and deploy up to nine modules (see below) – ranging in length from 60-120 minutes –including topics such as health center finance, operating a finance department, budgeting, and profitability, reporting, provider and team incentive compensation. In addition, examples and case studies should highlight efforts to improve financial processes and reporting and strategies to improve financial outcomes.

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

Scope of Work: Under this content area, selected vendor(s) will support NACHC in developing trainings to improve health center performance with an in-depth focus on managing the 330 grant and related funding streams. This includes topics such as, the 330 Grant Scope of Service, budgeting, and reporting at health centers. The vendor(s) responsibilities may include co-creation of training based on adult learning principles that aid participants in understanding the change management processes, fostering change as a FQHC leader, and creating a continuous quality improvement culture to maintain new efficiencies. The vendor selected under this content area must be a CPA firm.

Deliverables: Under this content area, NACHC will develop and deploy up to nine modules (see below) – ranging in length from 60-120 minutes. The sessions will include a practical discussion on how and what data to measure and report for federal compliance and successful decision-making.

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

Scope of Work: Under this content area, selected vendor(s) will support NACHC in developing trainings to improve health center performance by providing training and/or technical assistance on the role of accountability in compliance, the elements of an effective strategy for maintaining compliance, and the tools for managing the implementation of a compliance program to lead to organizational performance improvement.

Deliverables: Under this content area, NACHC will develop and deploy up to two modules (see below) – ranging in length from 60-120 minutes. These interactive sessions must include case studies and a review of operational tools.

Financial Elements of Corporate Compliance	<p>As part of the financial trainings, NACHC offers sessions/modules on topics:</p> <ul style="list-style-type: none"> • Elements of a revenue cycle compliance plan • How to make your compliance plan operational • The linkage between compliance and performance improvement
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Training Content Area: Revenue Cycle Management

Scope of Work: Under this content area, selected vendor(s) will support NACHC in developing trainings to improve health center performance in Revenue Cycle management by providing proven best practices used in health centers across the country.

Deliverables: Under this content area, NACHC will develop and deploy up to three modules (see below) – ranging in length from 60-120 minutes. Interactive sessions must include case studies and a review of operational tools.

Elements of Revenue Cycle Management	As part of the financial trainings, NACHC offers sessions/modules on topics: <ul style="list-style-type: none">• Elements of a revenue cycle Plan Do Study Act• Medicare Prospective Payment System (PPS)• Revenue Cycle Case Studies• Sliding Fee Discount Program
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Emerging Issues

Selected vendor(s) may support NACHC with addressing new and emerging healthcare issues by developing and/or delivering training and/or technical assistance products through deliverables to improve health center performance related to emerging and evolving issues. Example may include but are not limited to: financially related implications of the ending of the Public Health Emergency, wind-down of COVID-19 funds, considerations for boards related to financial oversight connected to the changing environment and other topical issues, such as support for Board Treasurers, among other issues. NACHC staff will determine the content area and delivery modality.

Information Requested

Proposals must be submitted using NACHC’s web-based portal by **June 4, 2023**. Incomplete proposals will not be considered. NACHC will notify all applicants on or around **June 23, 2023**.

Online Submission Portal:

Faculty and Advisors for NACHC’s Financial Operations Management
[Application Submission](#)

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

- Point of Contact Information
- Name / Description of Organization
- Capability Statement
- Resume(s)
- Evidence of Work & References
- Project Workplan
- Proposed Budget
- Signed Statement (see below)

Upon submission of a complete application, NACHC's review team will evaluate the applicant's qualifications in response to this RFP. Determining "qualified" enables a vendor(s) to engage in procurement opportunities.

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:

This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS). The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA, HHS, or the U.S. Government. For more information, please visit HRSA.gov.

Evaluation Criteria

Rating Domain	Application Selection Criteria To earn full points in each domain, the applicant must demonstrate:	Points
Evidence of Work & References	<p>Evidence of work must align with the project described in this RFP and demonstrate the ability to deliver technical skills as a subject matter expert (SME) within the specified content area. In addition, an understanding of adult learning needs and content knowledge should be evident where appropriate.</p> <p>Evidence of work must include the following:</p> <p>Work samples required in this RFP include:</p> <ul style="list-style-type: none"> • Sample presentation(s), supplementary training product(s), and/or publications developed and delivered by vendor demonstrating an understanding of the specific SME area(s), as described in this RFP. Page Limit: 10 pages per training content area <p>References required in this RFP include the following:</p> <ul style="list-style-type: none"> • Past client evaluations, reference letters, and/or testimonials demonstrating quantitative and/or qualitative feedback from at least two audiences, clients, or engagements occurring within the past three year of the RFP application date. Page Limit: 5 pages per training content area 	25
Project Workplan	<p>The workplan must provide a schedule of activities that describes how the vendor will achieve the scope of work and deliverables outlined in this RFP. The workplan should include activities, outputs, measurable results/outcomes, and a timeline.</p> <p>The project timeline must visually represent the chronology of works for the Scope of Work and Deliverables, placing the key points of the project (milestones) on a timescale.</p>	25
Proposed Budget	<p>The budget proposal must summarize the estimated costs for the deliverables as described in this RFP. In addition, the budget proposal must include the following categories as needed: direct cost, indirect cost, equipment and materials, travel, and other expenses.</p> <p>Further, direct costs must include the daily and hourly rates for all expert(s) and staff engaged in work. Rates should reflect the overall cost rate, including any fringe, overhead, and/or general & administrative expense (G&A) if required.</p>	20
Capability Statement	<p>Provide a brief document highlighting your ability to deliver technical skills and/or subject matter expertise. Please ensure that the Statement includes your ability to work with others and collaborate.</p> <p>Page Limit for Capability Statement: 2 pages</p>	15
Resume(s)	<p>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.</p> <ul style="list-style-type: none"> • Page Limit for Resume(s)/CV(s): 2 pages per key expert/staff 	15

Total	100
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Scoring Matrix

- a. NACHC’s review team will assign scores on a scale of zero (0) to five (5) where the end and midpoints are defined as follows:

Score	Description	Discussion
0	No Value	The Response does not address any component of the requirement, or no information was provided.
1-2	Below Average	The Response only minimally addresses the requirement and the Bidders ability to comply with the requirement or simply has restated the requirement.
3	Average	The Response shows an acceptable understanding or experience with the requirement. Sufficient detail to be considered "as meeting minimum requirements".
4-5	Above Average	The Response is thorough and complete and demonstrates firm understanding of concepts and requirements.

- b. A score of zero (0) on any scored requirement may cause the entire application to be eliminated from further consideration.
- c. Application scores will be calculated by multiplying the average (mean) score assigned by the review committee members by the weight assigned to each scored element: Average Score x Weight = Points Awarded