

THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

REQUEST FOR PROPOSALS (RFP) ADDENDUM

FAILURE TO RETURN THIS ADDENDUM IN ACCORDANCE WITH THE INSTRUCTIONS BELOW MAY SUBJECT YOUR PROPOSAL TO REJECTION

RFP Number: RFP12152023VLG

Addendum Number: 01

Addendum Date: January 3, 2024

RFP Opening Date / Time: January 16, 2024, 3:00 PM Eastern Time (ET)

Instructions: Return one properly executed copy of this addendum prior to the RFP Opening Date / Time specified above. This addendum may be included with your proposal, or it may be emailed separately to Veronica.Green@unc.edu

A. The following subsections are hereby renumbered 1 as follows:

- Page 15: **TIMELINE (5.3)** is renumbered as subsection 5.5.
- Page 15: **ACCEPTANCE OF WORK (5.4)** is renumbered as subsection 5.6.

B. Please see the following University responses to all questions received by the deadline to submit written questions of December 21, 2023 at 4:00 PM ET:

1. Question: Do you have any technology preferences for developing the SAAS Platform?

Answer: The only required technology choice is that the SaaS platform infrastructure be deployed on the AWS cloud. The technology choices for mobile and backend implementation are up to the developer. The preferences are toward widely adopted and supported frameworks such as React Native for mobile and either Node.js or Django for the backend.

2. Question: Do you require integration of existing third-party applications or hyperlinks within the portal?

Answer: There may be a need to embed a link to an external BI dashboard within the application, e.g. one created in Amazon QuickSight. Any other required integrations, e.g. ESO, would be done via published APIs.

3. Question: Are you open to fully custom solutions instead of proprietary or open-source options?

Answer: We are open to fully custom solutions though we will not accept a customized commercial-off-the-shelf (COTS) solution. However, we are open to utilizing existing and well supported 3rd party development libraries/packages within the code, e.g. Twilio, provided the features that are being leveraged are HIPAA compliant if they were to ever store/transmit/process PHI.

4. Question: Where are the data systems located (on-premises, cloud, hybrid)?

Answer: Cloud

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5. Question: Is the vendor expected to perform data cleansing activities?

Answer: Data migrated from legacy systems will need to be normalized into a format compatible with the Goldie database models. If customers are unable to meet the data formatting requirements on their end, this may require some level of customization to the script that will be handling the data load into the Goldie backend.

6. Question: How is metadata currently managed? Are there any existing tools?

Answer: This is a net-new platform and there is no prior versions. Existing customer data is hosted in their own systems and will need to be migrated to the Goldie database backend prior to launch.

7. Question: What is the required data refresh/update frequency?

Answer: ESO data collected via FTP should be event-driven (i.e. a file has been dropped off). Offline data should refresh as soon as the device is back online. The remaining refresh should be API-driven e.g. notification via API initiates refresh.

8. Question: Does the university expect the vendor to develop a data warehouse as a centralized repository for disparate data sources?

Answer: No. All application data will be hosted in an AWS RDS database. Disparate data sources should be assumed to be normalized either based on data dictionary requirements or built to API specifications.

9. Question: Are there any third-party systems or websites that need integration with the newly developed SAAS platform?

Answer: Yes as specified in the RFP document.

10. Question: How many users will interact with the platform, and can you specify their roles?

Answer: There are three roles: Community Paramedic, Peer Support Specialist, and Administrator. Initial load will be no more than 100 users. System will scale over the next 5 years to 10,000 users.

11. Question: Please provide the expected number of concurrent users accessing the platform.

Answer: Initially 100 users scaling to 10,000 users over 5 years.

12. Question: Does the state plan to implement Single Sign-On (SSO) functionality for staff?

Answer: Single Sign-On is not a required feature for the MVP.

13. Question: Is there an expectation for the platform to include an internal or external reporting dashboard? If so, are there specific Business Intelligence (BI) tools to integrate?

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Answer: v.01 & v.02 specify exporting data hourly to a pre-defined location, e.g. an S3 Bucket, for Amazon QuickSight. v.03 and v1 specify Dashboard requirements (see Dashboard tab of Features & Functions spreadsheet).

14. Question: Who is responsible for hosting and data migration of the Goldie Health SaaS Application Development?

Answer: Goldie will provide multiple AWS environments including development, testing, staging, and production. The developer is responsible for delivering the tested application code to the staging environment and providing the required mechanisms, i.e. data load scripts, to load the customer data into the production environment.

15. Question: Do you have hosting preferences, such as Cloud or On-Premises?

Answer: Yes; hosting on AWS is a requirement.

16. Question: Is ongoing post-implementation support and maintenance expected from the vendor? If so, please specify the duration of this support.

Answer: Yes, an annual support contract is anticipated.

17. Question: What is the anticipated project start date and end date?

Answer: Project will begin as soon as selection and contracting is completed which is forecasted to be in February 2024 and is subject to change at the University's discretion.

18. Question: Are there budget constraints that need to be taken into account?

Answer: We recommend bidders submit best offer. Pricing will impact 25% of the selection decision.

19. Question: The RFP says "Supplier's proposal shall constitute a firm offer." Is the University ready to consider other engagement models?

Answer: The University recommends submitting the best offer for a not-to-exceed price. During the course of the project, the selected vendor and University may agree to changes in features and functions.

20. Question: The RFP document says, "Proposal price shall constitute the total cost to the University for complete performance in accordance with the requirements and specifications herein, including all applicable charges for handling, administrative, and other similar fees and expenses."

Answer: Correct

21. Question: Is the breakdown into three releases final, or can we offer adjustments (moving functionality from one release to another) if we believe it will allow University to save time and/or budget?

Answer: Yes, the vendor and University may agree to changing the sequence of features and functions to optimize outcome. Note that the University anticipates 4 releases (v0.1, v0.2, v0.3, and v1.0) with v1.0 being the full featured minimally viable product.

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22. Question: What is the difference between releases “MVP v.0.3” and “v1.0”? In the table, they are grouped into one column.

Answer: Features and functions for the last two releases can be done in any order. This is designed to give the selected vendor flexibility in timing of those features and functions.

23. Question: The RFP document says, “bidders should propose a recommended architecture”. Does it include choosing the AWS services to be used, their configuration and the way to organize and connect them into a common architecture?

Answer: Yes, this includes choosing and optimizing which AWS services to use except where specified e.g. Amazon QuickSight. The developer and the University will discuss and agree on the final architecture prior to the start of the project.

24. Question: Section 5.4 says, “the University shall have the obligation to notify Supplier, in writing ten (10) calendar days following completion of such work or deliverable described in the Contract that it is not acceptable” ”Which one is correct, 10 calendar days or 15 calendar days?

Answer: Ten (10) calendar days

25. Question: The section only specifies terms for Software purchases, but not for Services. We would like to offer the following payment terms for Services. Customer shall be billed monthly based with: The balance payment for the last month, based on the efforts actually spent by the Team members providing the Services;50% of the projected workload for the next month. Can you please confirm it’s acceptable for the University?

Answer: Payment terms are net thirty (30) days after the University’s receipt of a correct invoice or acceptance of the Products and Services, whichever is later. Milestone/progress payments are permissible.

26. Question: The RFP document says, “a credit based on a sliding scale, as set forth in the table below, ranging from twenty percent (20%) to one-hundred percent (100%) of one-twelfth of the annual Software license fees”. We assume that the work done under this RFP will not include delivery of any readily-available Software, only creating new custom software for the University on the “work for hire” basis. Respectively, we do not expect to charge the University with any annual Software license fees. Can you please confirm this paragraph is not applicable and there will be no Remedy for falling below the Software Availability Guarantee?

Answer: Confirmed that the University does not anticipate paying software license fees in this project.

27. Question: We assume hosting will be provided by Amazon Web Services. Therefore, backup procedures will be controlled by Amazon and we will not have any control over their Services Fees. Can you please confirm this paragraph and this section are not applicable?

Answer: Confirmed

28. Question: We assume that the work done under this RFP will not include delivery of any readily-available Software, only creating new custom software for the University on the “work for hire” basis. Can you please confirm these sections are not applicable?

Answer: Confirmed

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29. Question: What are the specific integration points or APIs that Goldie needs to connect with? Are there existing systems or databases that Goldie should integrate with?

Answer: The RFP specifies the following specific integrations: ESO via a .csv file dropped off into an FTP folder and ESO Partner API. In addition, the RFP specifies additional features which the vendor can address using 3rd party libraries including faxing, bug reporting, and texting. For these additional features, the vendor should propose the 3rd party libraries to be integrated with and corresponding APIs provided the features within these 3rd party libraries are HIPAA compliant any time they will host/transmit/process PHI.

30. Question: Can you provide details on the specific security and compliance requirements for handling sensitive health information? How should Goldie ensure HIPAA and 42 CFR compliance?

Answer: The AWS accounts that will host PHI will have a signed Business Associates Agreement with AWS. Within those accounts, the vendor can use any available AWS services for their work, but must guarantee that they only leverage HIPAA eligible services when they build out features that will ever host/transmit/process PHI (<https://aws.amazon.com/compliance/hipaa-eligible-services-reference/>). The vendor will have to guarantee that all services that host PHI data are configured to encrypt that data storage per AWS specifications. The vendor will have to guarantee that all service connections transmitting PHI in transit will have secure TLS connections in place. All HIPAA eligible services will have the highest level of audit logging enabled on them. Additional logging mechanism will also be implemented within the platform for the purposes of service auditing and troubleshooting with specific log retention requirements. The Goldie team will dictate which specific AWS security services will need to be enabled in which specific account, e.g. GuardDuty.

Preference will be given to vendors that have previous experience with building applications to comply with HIPAA and 42 CFR rules. An independent third party will verify HIPAA compliance with a SOC2 audit and corresponding audit for 42 CFR. Goldie will employ the audit vendor and report deficiencies to the vendor for remediation.

31. Question: What are the user authentication and access control requirements for Goldie? Are there specific roles and permissions that need to be implemented for different users?

Answer: Access control will be based on user name and password with password requirements meeting HIPAA and 42 CFR requirements. See Administration tab under "User Onboarding" for the three specific roles.

32. Question: Besides iOS 11, are there any plans to extend Goldie's compatibility to other mobile platforms in future releases?

Answer: Android is contemplated but not a specification.

33. Question: Can you provide more information on the data extraction process for analytics purposes? Are there specific reporting formats or dashboards that should be supported?

Answer: These are specified in the Dashboards section. For the purpose of visualizing the data in Amazon QuickSight, a background process will need to be set up to query the database at a pre-defined interval, create a data extract, and place the extract into an S3 Bucket where it will be subsequently consumed by Amazon QuickSight.

34. Question: What are the expected user loads for Goldie, and are there scalability requirements that need to be considered? What performance benchmarks are expected?

Answer: Initially 100 users scaling to 10,000 users over 5 years. The system is expected to be able to scale to accommodate field users working with patients in live interactions and will need a highly responsive tool. Backend auto-scaling will need to be set up. There are no specific benchmarks at this time.

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35. Question: Will there be any support or guidance provided during the implementation phase, especially for the integration with existing systems or databases?

Answer: Goldie will staff a Chief Technology Officer and a product specialist to work closely with the winning vendor. They will provide support and guidance during the development and deployment process.

36. Question: Can you provide more details on the subscription and licensing model for Goldie? How will implementation, integration, and subscription fees be structured?

Answer: This information is not being shared with bidders.

37. Question: What factors will be considered in determining whether to proceed with the optional phases (v0.2, v0.3, v1.0)? Are there specific criteria or milestones that must be met?

Answer: The criteria will be based on the vendor's performance meeting the initial requirements, features, and functions for v0.1 in a timely basis.

38. Question: Are there any specific training requirements for end-users, and what level of documentation is expected to accompany the Goldie platform?

Answer: The platform is expected to be intuitive enough that training end-users will take no more than 3 hours for new users. Training documentation will be produced by Goldie. However, relevant development and architectural documentation is expected to be provided by the vendor development team to ease transition to the Goldie in-house development team.

39. Question: Is there any incumbent for this opportunity?

Answer: No

40. Question: If there is an incumbent then why are you looking for other companies? Are you not happy with them?

Answer: There is no incumbent.

41. Question: If there is an incumbent then are they bidding for this opportunity?

Answer: There is no incumbent

42. Question: What is the budget range allocated for the development and implementation of Goldie?

Answer: Budget information is not being shared with bidders.

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Execute Addendum:

Vendor Name: _____

Authorized Signature: _____ Date: _____

Name and Title: _____

Email Address: _____