

Request for Proposal:

Juniper Software Assessment and Roadmap Development

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Request for Proposal:

Juniper Software Assessment and Roadmap Development

Overview

Trellis, through its Juniper program, seeks an experienced software consultant to evaluate our current software application and provide strategic guidance for future software development. The consultant or firm will develop a comprehensive roadmap for enhancements, including the specific functions and capabilities needed to achieve development milestones. The consultant may also recommend alternatives to the continued development of our existing application by recommending alternative SaaS platforms.

Project Background

Juniper, a program of Trellis, is committed to improving community health and well-being by providing social care services focused on preventive care, health equity, and the social determinants of health. Our mission is to enhance the quality of life for our neighbors, particularly those in underserved communities, by offering innovative care solutions and support systems.

You can learn more about Trellis here: <https://trellisconnects.org/>

You can learn more about Juniper here: <https://yourjuniper.org/>

Our software is used to deliver Juniper services in Minnesota. We also license our software to social care networks like Juniper in other states. Today, we license our software to the following organizations:

- Healthy Living for Me (Maine): <https://healthylivingforme.org>
- Illinois Pathways to Health (Illinois): <https://www.ilpathwaystohealth.org>
- Texas Healthy at Home (Texas): <https://texashealthyathome.org>

As part of our ongoing efforts to innovate and expand our services, we seek to enhance our current software application used to support Juniper's operations to better support future care models and align with industry standards. The software is critical in managing care delivery, capturing data, integrating with other systems, and supporting our strategic initiatives. With a fast-approaching timeline for testing new care models in the fall, we aim to analyze our existing system while simultaneously piloting these new models and workflows.

Currently, Juniper offers healthcare services to community members. The software we use to deliver those healthcare services (also referred to as Juniper) supports administering healthcare services to groups of people (e.g. classroom style). We will add the ability for our software to



support scheduling 1:1 healthcare services. Those services could include scheduling and delivering chore services, homemaker services, home-delivered meals, home modifications, etc. The services would include accompanying data capture.

Project Scope

Objective

We seek an experienced IT software consultant or consulting firm to assess our current software application, identify areas for improvement, and develop a comprehensive development roadmap that considers improvements to current operations, future operations, and our SaaS business. This roadmap should outline feature enhancements, API integration, FHIR enablement, HITRUST Certification, data capture, acceptance of data feeds, and other necessary updates. Additionally, the consultant should consider whether existing SaaS solutions, such as care management platforms, might better serve our needs, and recommend potential products if appropriate.

Key Deliverables

The consultant will be expected to provide the following deliverables:

1. Initial Assessment Report: A comprehensive analysis of the existing software. The comprehensive analysis must include strengths, weaknesses, opportunities for improvements, and threats to the software's success related to usability, functionality, performance, security, and data integration.
2. Feature Enhancement Roadmap: A detailed plan for implementing new features and improving existing ones that align with our strategic vision and operational needs. For specific features, see below in 'Key Milestones'.
3. SaaS Solution Assessment: This evaluation includes available SaaS solutions that could potentially replace or supplement the current software, along with cost-benefit analyses and subscription recommendations, if applicable.
4. Final Recommendations and Roadmap: A consolidated report with final recommendations, including a prioritized roadmap for software development and implementation. The roadmap must also include specific tasks, capabilities, functions, and features to achieve milestones in the roadmap.

At Trellis's discretion, the consultant or firm will also email or hold an in-person/virtual meeting to provide weekly status updates to Trellis staff members. These updates ensure that the consultant or firm has all of the necessary information needed to perform activities under the contract while also providing Trellis with regular updates on the projects' status.

The selected consultant or firm may also need to coordinate with our existing software development vendor, RSM. Meetings with RSM or other partners are included in this scope of work. We hold a recurring meeting with RSM each week on Tuesdays from 10:00 – 10:30 AM.

Project Timeline

1. August 1, 2024: RFP Release
2. August 1 - August 23, 2024: Trellis accepting proposals
3. September 6 – September 13, 2024: Vendor selection and contract negotiation
4. September 16 - October 1, 2024: Project kickoff

Project Duration

The project is expected to begin promptly upon the selection of the consultant and last approximately eight weeks. Upon completing the activities outlined in this RFP, Trellis may choose to continue engaging the consultant on an hourly, retainer, or employee basis.

Key Milestones

- Kickoff Meeting and Related Preparation
 - Due Date: October 1, 2024
 - Description: Initial meeting with key stakeholders to discuss project objectives, scope, and timelines.
- Initial Assessment Report
 - Due Date: October 15, 2024
 - Description: Comprehensive analysis of the existing software application, including strengths, weaknesses, and areas for improvement.
 - Deliverable: Brief report detailing analysis.
- Feature Enhancement Roadmap
 - Due Date: November 1, 2024
 - Description: Development of a detailed plan for implementing new features and improving existing capabilities aligned with strategic goals. The features must also comply with applicable laws including, HIPAA and related data privacy laws. The feature roadmap should consider the impact on our existing SaaS customers in Maine, Illinois, and Texas. Features include (but may not be limited to):
 - API integrations with healthcare software (e.g., Epic, Athena)
 - API integrations with Trellis financial software, Sage Intacct, for revenue cycle management activities
 - HL7 FHIR information exchange standard implementation plan
 - Automated messaging (e.g., texting, emails)
 - Data capture and reporting (e.g., data capture workflows)
 - Reporting (e.g., improvements to data analysis and visualization using reporting structures)



- Artificial intelligence integration
 - Security controls meeting or exceeding controls defined in HITRUST CSF
 - Scheduling of 1:1 services
- Deliverable: Report detailing plan, associated development timelines, cost estimates, and workflow charts (e.g., Gantt chart).
- Outside SaaS Solution Assessment
 - Due Date: November 20, 2024
 - Description: Evaluation of available outside SaaS solutions that could replace or supplement the current Juniper software, with cost-benefit analyses. Evaluation includes market research, solution evaluation and comparison, cost-benefit analysis, and recommendations.
 - Deliverable: Report
- Final Recommendations and Roadmap
 - Due Date: December 1, 2024
 - Description: A consolidated report with final recommendations, including a prioritized roadmap for software development and implementation. The report should consider the impacts on our existing SaaS customers in Maine, Illinois, and Texas. Recommendations must comply with applicable laws, industry standards, and best practices.
 - Deliverable: Report, including executive summary

Juniper's Technical Specifications

Juniper software is hosted on the Microsoft Azure Cloud platform. The application's programming language is C#. Our SaaS business has a multi-tenant architecture. Our front-end UI is hosted in Umbraco and is in Java Script. Juniper uses Azure DevOps, SQL PaaS, Azure App Services, Entra ID B2C, and Azure Storage.

Consultant Qualifications

Required Experience and Skills

- Experience in IT software consulting, particularly in the healthcare sector.
- Knowledge of software development methodologies and lifecycles.
- Expert knowledge of software interoperability, specifically in healthcare or other fields where the exchange of sensitive information is common.
- Knowledge of Microsoft Azure platforms, including SQL PaaS, App Services, and DevOps.
- Deep understanding of care management platforms, EHR systems, and SaaS solutions.

- Expertise in API design and integration, including RESTful services, and middleware technologies for connecting front-end and back-end systems.
- Strong analytical skills, the ability to understand complex software architectures and data flows, proficiency in conducting performance and scalability analysis, and the ability to provide strategic recommendations.
- Experience in evaluating and recommending software solutions based on organizational needs.
- Familiarity with the regulatory landscape and compliance requirements in healthcare technology, specifically HIPAA and GDPR.

Preferred Qualifications

- Previous work with organizations focused on social services and community health services.
- Previous work experience (employed or contracted) with healthcare risk-bearing entities, and understanding of healthcare workflows, clinical processes, and unique challenges of healthcare software.
- Individual or firm with experience in leading projects of varying sizes, including demonstrated ability to achieve milestones in a timely manner.
- Experience conducting compliance audits and ensuring regulatory adherence to healthcare regulations such as HIPAA and GDPR as it relates to healthcare software solutions.
- Technical writing experience.
- Familiarity with development environments, version control systems such as Git, and debugging tools.
- Experience with performance testing tools, like JMeter, usability testing tools, and security assessment tools.

Proposal Submission Requirements

Proposal Content

Proposals should include the following sections:

1. Executive Summary: A brief overview of the proposed approach and key differentiators.
2. Consultant Background: Information about the consultant or consulting firm, including relevant experience, short bio, resume, and qualifications.
3. Approach and Methodology: A detailed description of the proposed approach to the project, including methodologies for assessment and roadmap development.
4. Project Timeline and Deliverables: A timeline with key milestones and deliverables.
5. Cost Proposal: A detailed cost breakdown, including fees for each project phase.



6. References: At least three references from previous clients within the last five years, particularly those in the healthcare industry. Please describe the types of projects undertaken with these references.

Submission Deadline

Proposals must be submitted no later than August 23, 2024. Late submissions will not be considered.

Submission Process

Proposals should be submitted electronically to Mark Cullen at mcullen@trellisconnects.org with the subject line "RFP Submission: Juniper Software Assessment and Roadmap Development."

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

1. Relevant Experience and Expertise: The consultant's experience in healthcare IT and related projects.
2. Approach and Methodology: The clarity and feasibility of the proposed approach.
3. Cost and Value: The cost-effectiveness of the proposal in relation to the value provided.
4. References and Track Record: Feedback from references and demonstrated success in similar projects.

For questions or further information, please contact:

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