

REQUEST FOR PROPOSAL (RFP)
CONSULTANT FOR SYSTEMS AND SOFTWARE
TECHNICAL PROJECT MANAGEMENT



HEARTSPRING, INC.
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JANUARY 10TH, 2023

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INTRODUCTION

Heartspring, Inc.

This Request for Proposal (RFP) invites prospective vendors with experience in digital transformation or enterprise architecture to submit a proposal to provide technical project management to applications and systems review and provide an integration strategy to Heartspring. The RFP provides vendors with the relevant operational, performance, application, project management, and information technology requirements the software and systems must fulfill.

THE SOLUTION

Heartspring will select a solution/service provider for technical project management for applications and systems review and provide an integration strategy. Our goal is to choose the vendor that best satisfies all the specifications listed in this request for proposals. In accordance with the RFP, Heartspring may decide to award a contract. Your company is welcome to take part in this process and submit a proposal that meets Heartspring's needs.

Vendors will find all the information they need to accurately analyze and assess Heartspring requirements in the RFP. To meet the needs outlined in this call for proposals, service providers are encouraged to reply by outlining their expertise and knowledge and supplying any further information that may be needed. The service providers that meet the requirements will be invited to participate in the final stages of the selection process, which include pricing negotiation and evaluation.

SCOPE OF WORK

Heartspring is seeking proposals for a technical consultant who will perform a thorough business analytic evaluation of our current technological infrastructure concerning our client base's needs as well as the development of a suite of integrated solutions, either purchased or already in place, that will not only better enable us to meet our client's needs efficiently and effectively but also lay a strong foundation for our growth and expansion in the future.

1. *Stage One – Data Collection and Analysis*
 - a. Analysis of current needs assessment
 - b. Analysis of existing applications, systems, and solutions
 - c. Interviews with End-users
 - i. Several designated representatives from each department
 - ii. On-going interaction throughout the process to refine needs and solutions.
2. *Stage Two – Systems Integration and Strategic Planning*
 - a. Work with departmental stakeholders on an iterative basis to determine the effectiveness of proposed solutions.
 - b. Develop a suite of applications and systems that work seamlessly to meet previously determined benchmarks for efficiency, adaptability, and effectiveness.
 - c. Managing vendor relationships
 - d. Develop a sandbox environment to test applications and their integration potential.
3. *Stage Three – Evaluation*
 - a. Evaluate the testing period and fill any newly discovered gaps in the process or service.
 - b. Create an implementation plan and work with us to determine the next steps.

CONFIDENTIALITY

Vendors are granted exclusive access to Heartspring's proprietary and private information to assess and compose your proposal, which includes this request for proposals and any other materials and information provided by Heartspring. Please delete any copies of the RFP and confirm your non-participation in writing or by email if your company decides not to respond to it at any point.

This document should not be duplicated except as necessary to prepare your response. This document should not be disclosed or distributed to any third party. All copies of this document except one file copy should be destroyed following the submission of your response. The file copy should be held confidential and not used for any purpose other than bid evaluation, response preparation, and subsequent discussion with Heartspring, if any result. It would be best if you safeguarded the confidentiality of this document and any copies with the same degree of care with which you safeguard your own confidential information. Vendors may not use the name, logo, or trademarks of Heartspring in connection with any advertising or, publicity materials or activities without the prior written consent of Heartspring. The obligation not to disclose any confidential information shall not be affected by bankruptcy, receivership, assignment, attached or seizure procedures, whether initiated by or against the vendor, nor by the rejection of any agreement between Heartspring and the vendor, by a trustee of the vendor in bankruptcy, or by vendor as a debtor-in-possession or the equivalent of any of the preceding under local and state law.

VENDORS INSTRUCTIONS

BACKGROUND

This RFP has been issued to organizations that will respond satisfactorily to the Request for Proposals dated <TBD>. The RFP identifies Heartspring's requirements in sufficient detail in order to identify a preferred vendor.

GENERAL INSTRUCTIONS

Vendors are requested to consider the following instructions when preparing their responses:

- Vendor responses must be valid for three (3) months from the date of submission.
- Vendors must address all items and matters raised in this RFP. Failure to adhere to the specified format may disqualify a vendor from further consideration.
- Any statements made about the evaluation, assessment, performance, and specifications of the proposed solution will be considered to be accurate and will be incorporated into the final contract agreement.
- Any functionality and features not included in the cost estimate must be clearly identified in the responses to the RFP.

Submission of proposals shall constitute evidence that the vendor has made all the above-mentioned examinations and is free of any uncertainty with respect to conditions that would affect the execution and completion of this project.

RFP BINDING BID PROCESS & CHANGES

Heartspring reserves the right to negotiate any or all RFP terms and conditions, and to cancel, amend or resubmit this RFP in part or entirety at any time. This RFP has been issued exclusively to provide adequate information about technical project management for applications and systems review and provide an integration strategy for Heartspring in order to receive a proposal for this project from vendors. While one or more vendors may be selected as candidates, Heartspring may negotiate a vendor contract with one or more respondents. Heartspring reserves the right to reject any or all of the responses received for any reason or no reason and to decline negotiating and signing a vendor contract with any vendors responding to the RFP, regardless of whether any vendor's response is partially or fully accepted or rejected, or contains the highest or lowest mark-up or price, or the most timely services delivery commitment, or whether a vendor responds with a no-response notice or has an existing contract with Heartspring, and regardless of any other matter. Heartspring further reserves the right to negotiate with any vendor who does not receive this RFP. Accordingly, responses should be submitted in the terms most favorable to Heartspring. Heartspring will consider vendor responses as binding offers by vendors.

DISQUALIFICATION

Statements known to be, or subsequently found to be, inaccurate or misleading may disqualify the vendor from further participation in the evaluation process.

STRUCTURE OF THE RESPONSE AND CRITERIA FOR EVALUATION

All responses to this RFP must follow the structure given below:

1. Executive Summary, including but not limited to:
 - a. Legal Name:
 - b. Parent Company:
 - c. Corporate Headquarters Address:
 - d. Company Website:
 - e. How many years has your company been in business under its present name?
 - f. If you are a corporation or limited liability company (LLC), show the state and date of incorporation.
 - g. Is there, or has there been in the last three years, any litigation or governmental or regulatory action pending or threatened against your organization that might affect your ability to provide stated products or services?
State the status of any current or pending lawsuits.
2. Company Profile, including but not limited to:
 - a. Describe your organization's core businesses, products, or services.
 - b. Awards attained.
 - c. Financial stability of your company
 - d. You must certify that to the best of your knowledge neither your organization nor any of its employees are listed on the OIG list of excluded individuals/entities.
 - e. Identification of any conflicts of interest if doing business with Heartspring.
3. Relevant Experience & Customer References
4. Demonstrated Experience / Scope of Work
 - a. Experience with customer relationship management software integration and implementation.
 - b. Experience with financial management software implementation and integration with supporting systems such as donor relations, customer relations, etc.
 - c. Experience with web content management and Martech solutions software integration and implementation.
 - d. Experience with implementing a complete solution including dashboards, accounts payable, accounts receivable, billing (residential, school, insurance, and private pay), financial statement reporting, as well as Electronic Medical Records (EMR) and Electronic Health Records (EHR) integration and implementation.
5. Proposed Solution Description
 - a. Experience with standardization and consolidation of systems and software.
6. Project Plan / Timelines
7. Implementation Approach / Deliverables / Training Details
8. Post-Implementation Support per Agreement
9. Technical Project Management Experience and Approach (Please illustrate your organization's PMI experience and approach in terms of proposed team structure, communication plan, escalation management, quality assurance and control plan, and any other best practices for consideration)
10. Pricing Details

SCHEDULE OF EVENTS

Event	Date	Review/Approval
RFP Distribution	01/10/2024	
Request for Proposal Due Date	01/31/2024	
Target Date for Review of Proposals	02/07/2024	
Onsite Oral Presentation / Demo of the proposed Solution	02/14/2024	

Final Vendor Selection Discussion(s); Week of	02/21/2024	
Anticipated decision and selection of Vendor(s)	03/06/2024	
Service Level Agreement/MOU/Contract sign	03/13/2024	
Anticipated commencement date of work	03/14/2024	
Anticipated completion of work	05/14/2024	
*Dates are tentative and may be subject to change.		

CONTACTS

Any questions regarding technical specifications, Statement of Work (SoW) or contractual terms & conditions must be directed to:

Name	Kenny Bui, PhD
Title	Chief Operating Officer
Address	8700 E. 29 th St. N.
Phone	316-390-6061
Email	kennybui@heartspring.org

AWARDING OF CONTRACT

Heartspring is not bound to accept the lowest proposal and is not obliged to give a reason for rejecting a proposal. Prospective suppliers are advised that nothing in this documentation, or in any communication between Heartspring and any other party, shall be taken as constituting a contract, agreement, or representation between Heartspring and/or any other party, except for a formal award of a contract made in writing by Heartspring. Neither should it, nor they, be taken as constituting a contract, agreement, or representation that a contract shall be offered.

Please note that Heartspring reserves the right to vary the number of vendors invited to interviews and presentations, or dispense completely with this part of the process, at its sole discretion. Heartspring reserves the right at all points in the procurement process either not to select a candidate to go forward to the next stage, or, following completion of the procurement process, not to make any award of contract.

Heartspring has prepared this RFP in good faith. To the extent that Heartspring is permitted by law, Heartspring excludes any liability (whether in contract, negligence or otherwise) for any incorrect or misleading information contained in this RFP.

PRICING DETAILS

All prices quoted by the vendor must be fully itemized, in US currency, and inclusive of all taxes and all expenses. Heartspring expects to contract with the vendor on a Fixed Price basis for all components of the supply. We expect the vendor to quote a fixed price for:

- Consultation service fee
- Implementation services
- Any customization service fee
- All software and systems licenses for the vendor's products or services
 - To support Heartspring's efforts to standardize and consolidate its current software and systems

- Any EMR/EHR software and licenses being proposed will be addressed in a different Business Case
- All software and systems licenses for third-party products or services supplied by the vendor
 - To support Heartspring's efforts to standardize and consolidate its current software and systems
 - Any EMR/EHR software and licenses being proposed will be addressed in a different Business Case
- Any training or ongoing support fees commencing from the date of go-live based on the two bullet points above

Please clearly identify all assumptions made when producing these prices.

REVIEW AND APPROVAL

RFP Preparer

Kenny Bui, PhD
Chief Operating Officer

Date

Josh Rhoades
IT Lead, System Administrator

Date

Approvals

Role	Name	Signature	Date
President & CEO	Dan Soliday		
Chief Financial Officer	Crystal Hough		
Chief People Officer	Makala Navarro		
Chief Compliance Officer	Moniqueka Holloway		
Superintendent of Therapeutic School	Dr. Mike Bonner		
Clinical Director, Outpatient	Kara Gibson		
Director of RCM	Nicole Randle		
Director of Communications	Clara Miller		