Mountain Park Health Center

Enterprise Resource Planning

Request for Proposal

MOUNTAIN PARK HEALTH CENTER

mountainparkhealth.org

Mountain Park Health Center – Central Office

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Phoenix, AZ 85012

SECTION 1: GENERAL INFORMATION

1.1 INTRODUCTION

Mountain Park Health Center (Mountain Park) is seeking quotes from qualified respondents to provide Enterprise Resource Planning services. After this process, Mountain Park anticipates entering into agreement with qualified companies. This document is a Request for Proposal (RFP) for the services described below and the RFP establishes minimum requirements a Respondent must meet to be eligible for consideration, as well as information to be included in the Respondent's bid response.

1.2 OWNER

Mountain Park is an Arizona nonprofit corporation (incorporated January 1980). Mountain Park operates seven (7) Community Health Center Clinics in the greater Phoenix area, along with various state and federal programs. Among other resources, Mountain Park operates with the assistance of grants awarded by the U.S. Department of Health and Human Services (DHHS) under authority of Public Law 95-626, Section 330. Grant funds are subject to periodic review by DHHS. Mountain Park has approximately 1,000 employees. This Scope of Work (SOW) is supported, in part, by the Health Resources and Services Administration (HRSA) of DHHS under various grants. This information and conclusions are those of Mountain Park and should not be construed as the official position or policy of, nor should any endorsements be inferred by HRSA, DHHS or the U.S. Government.

1.3 SCHEDULE

Event	Date/Time
RFP Release	August 21st, 2019 5:00 PM
Respondents Questions & Request for Clarification Due	September 4th, 2019 3:00 PM
Mountain Park Answers & Clarifications Issued	September 18th, 2019 5:00 PM
Dead Period (No Communications, Working Period)	September 19th - October 2nd,2019
Proposals Due (No submissions accepted after due date/time)	October 2nd, 2019 3:00 PM
Mountain Park Internal Review of Proposals & Mountain Park Questions/Request for Clarification	October 3rd – October 16th, 2019
Respondents Presentations, If Applicable	October 21st - October 31st, 2019
Notifications	November 6th 2019

Mountain Park reserves the right to extend or otherwise modify any portion of the schedule. The organization will notify all firms that have submitted a proposal of any changes to the schedule.

1.4 SINGLE POINT OF CONTACT (SPC)

The SPC for this RFP is Richard Akowuah, Director of Supply Chain. Questions and clarifications regarding the RFP process, scope of work, data requests, or evaluation process should be addressed to 602 323 3276 or sourcing@mphc-az.org

1.5 IRREVOCABLE OFFER

Proposal shall constitute an irrevocable offer for 90 business days following the deadline for its submission. Reference to a certain number of days in this RFP shall mean business days unless otherwise specified.

SECTION 2: SCOPE OF WORK (SOW) & DELIVERABLES

Vendor proposals are being sought through this RFP for a project that includes acquisition of an Enterprise Resource Planning (ERP) platform. This new ERP system will replace multiple existing and disparate systems that are currently performing various business functions. It is the intent of Mountain Park to partner with as few ERP vendor platforms as possible.

Finance
- Finance Capabilities
  - General Ledger
  - Budget Planning and Tracking
  - Capital Project Accounting
  - Grant Management
  - Accounts Receivable
  - Accounts Payable
  - General Financial Reporting
  - Systems interface with EHR Revenue Cycle
  - Expense Reimbursement
- Employee Self-Service Capabilities

HR
- Human Resources Capabilities
  - Personnel
  - Payroll
  - Benefits
  - Applicant Interviewing
  - Applicant Tracking

- o Performance Management
  - o Employee Learning/Certification Tracking
  - o Medical Provider Privileging
- Employee Self-Service Capabilities

Supply Chain
- Supply Chain Capabilities
  - o Bid Management
  - o Requisitions
  - o Purchasing
  - o Contract Management
  - o Employee Self-Service Capabilities
  - o Asset Management Capabilities
  - o Inventory and Asset Tracking

Support Services
- System Integration Services
  - o Active Directory
  - o Single Sign-on (SSO)
- Training
  - o Online
  - o In-person
  - o Extensive and detailed portfolio of training options
- Maintenance and Support – 24x7
  - o Assigned Technical Account Manager
  - o Assigned Account Manager
  - o System Reporting
    - Integration with 3rd-party data visualization, i.e. Microsoft PowerBI
  - o Workflow Automation

Preferred Solution

Mountain Park plans to implement a modern, industry standard, SaaS solution that is scalable, configurable by Mountain Park staff and requires few, if any, modifications to the software to meet the Mountain Park's needs.

Mountain Park understands that no one vendor may be able to provide the optimal solution, but we expect to consolidate to a minimal number of platforms. Consequently, Mountain Park is soliciting and will evaluate solutions that provide one or more components of the solution. These solutions will be evaluated based on their ability to meet Mountain Park's functional requirements and share data between other components, as needed, to meet Mountain Park's objectives.

Mountain Park is looking to establish a long-term relationship with a vendor. As such, Mountain Park is looking for a vendor who supports other non-profit healthcare organizations, and has a proven track record of:

  - o Financial stability
  - o Successfully implementing its system with similar sized organizations like Mountain

Park
- o Successfully implemented fifty (50) SaaS deployments in the last five (5) years
- o Sustained history of significant re-investment in its software to keep it modern in terms of functionality and platform.

It is critical to the success of this project that the vendors perform extensive business analysis and provide process improvement recommendations to take full advantage of the proposed solution's potential. Solutions that are inflexible and require complete changes to our existing process are unlikely to be selected. A balanced approach that allows for configuration changes to adjust the software to meet our needs is the most likely to succeed.

Mountain Park's Objectives

The objectives of this deployment include:
- o Automate functions currently requiring manual intervention
- o Automate manual processes to reduce staff workloads
- o Reduce/eliminate redundant data entry
- o Provide improved data analysis and reporting through easy for average users to use; customizable reporting tools and modern analytical toolsets
- o Provide employee self-service capabilities for Demographics, Expense Reporting, Time Reporting, Payroll and Benefits functions
- o SaaS architecture with minimal on-prem presence
- o Preferred to be a browser-only solution
- o Preferred to be accessed by any device
- o Operate within a modern digital architecture
- o A system that provides a high degree of configurable parameters instead of customization
- o A fully integrated Electronic Document Management System for file scanning, storage, electronic forms processing, and workflow

Vendor Solution Preferences

Mountain Park prefers to partner with as few vendors as necessary to meet its needs. Vendors are encouraged to partner with subcontractors to close functionality gaps, as necessary. Mountain Park also prefers an integrated set of modules over interfaces. That said, Mountain Park will accept proposals from vendors who respond to one or more components of the total ERP solution; however, preference will be given to vendors responding with more complete solutions

Project Elements

Mountain Park requires proposals with the following project elements:

- o Consideration given to Mountain Park's non-profit health care status; proposal tailored to health care organization
- o SaaS solution with effective disaster recovery safeguards
- o Effective Project Management by the vendor and/or third-party partner

- Mountain Park is seeking a partner committed to investing in the long-term (~10 years)
- Vendor's commitment to keeping the system state-of-the-art
- Competitive prices

Contracts shall be made only with a responsible vendor who possesses the ability to perform successfully under the terms and conditions of this proposed procurement. Consideration shall be given to such matters as software and hardware quality, vendor integrity, record of past performance including prior successful implementation of proposed products, and financial and technical resources.

Each firm submitting a proposal must have established a state and/or national reputation for the planning, supplying, configuring and maintaining their systems.

Although Mountain Park is requesting proposals for complete systems, including software, and services that include any and all third-party components, Mountain Park may choose not to acquire all optional system components. Mountain Park may also exercise the option to procure third-party components directly using vendor-provided specifications.

It is important for the vendor responders to understand that Mountain Park has invested in its infrastructure and expects to leverage that infrastructure. It should be understood that Mountain Park is seeking a SaaS-only solution. If on-prem components are required, the vendor is expected to (a) define any needed on-prem IT infrastructure requirements as part of its proposal, and (b) propose services that enable it to certify that the IT infrastructure utilized by Mountain Park meets its minimum standards, so that the vendor can comply with performance requirements specified in this RFP.

Key System Functions

Certain key system functions are of interest to Mountain Park. These will be given a higher weight during the evaluation process and must be shown during the demonstration phase of the evaluation process.

Required Features		Desired Features

IT

Required Features		Desired Features
☐ Integration with user management system (active directory) ☐ Integration w/existing data visualization tool (PowerBI) ☐ Unified application set across organization ☐ Hosted in HIPAA compliant cloud environment (i SaaS) ☐ Audit and interaction logs (detailed & complete) ☐ Integrated workflow automation across enterprise	☐ Migrate data from existing systems ☐ Integrate with O365 for mail delivery ☐ Capability to develop and deliver reports ☐ Defined group-based rights management to the system ☐ Clarified patching and update cadence (easy implementation & process) ☐ Full user, support and administrator training ☐ Mobile device supported by App, IOS & Android	☐ Capability to create templates for full automated user account creation based on job title ☐ Ability to generate/modify reports, dashboards, ad-hoc, etc. ☐ Seamless integration with Service Desk software ☐ Automated monitoring/reporting of access requests and elevations ☐ Client-less application

FINANCE

Required Features		Desired Features
☐ Fund accounting ☐ Grant management ☐ Communicates with EHR & HRIS ☐ Budget controls ☐ Multiple entities ☐ Role-based security ☐ Enforce PO and AP approval policies	☐ Manage multiple segments in the chart of account ☐ Storage of invoice/JE back-up documents ☐ Access data using outside tools/systems (SQL, ODBC, Power-BI, etc.) ☐ Communicate & interface (HRIS, payroll, AP systems)	☐ Reporting and analysis ☐ Budgeting and forecasting ☐ Cost accounting style of expense allocations ☐ Multiple document import support

HUMAN RESOURCES

Required Features		Desired Features
Applies to all: ☐ Security and privacy (compliant/protected) ☐ Manager & employee notifications ☐ Support for systems ☐ Robust reporting, tracking & analytics capabilities (HR metrics, learning systems trainings, weekly file for employee benefits vendor, new-hire report, EEOC, 403B file) ☐ Integration with employee benefits vendor HR/Payroll Systems: ☐ Tracking of credentials, trainings and certifications (skills & competencies) ☐ Employee information and personnel tracking Job & Salary History: ☐ Performance evaluations ☐ User provisioning capability (new hires, onboarding, off boarding) ☐ Time, attendance and absence management (requests, approval, processing, accruals & tracking) ☐ Compliance (ACA, W2, labor laws, tax standards) ☐ Payroll management ☐ Expense reimbursement system capability ☐ Position control Interviewing Software: ☐ Integration with applicant tracking system	Employee Files: ☐ Ease of searching, retrieving, filing, scanning ☐ Automated integration with Applicant Tracking System (prefer within same system) ☐ Retention schedule (destruction) Applicant Tracking System: ☐ Job posting and vacancies ☐ On-boarding ☐ Recruiting Privileging System: ☐ Automated approval process ☐ Storage of provider privileging information ☐ Self-service onboarding ☐ Ability for staff to upload items (i.e. CPR certification, licenses, etc)	HR/Payroll System: ☐ Schedules Applicant Tracking System: ☐ Automated background checks Learning Systems: ☐ Additional learning opportunities for employees ☐ Engagement and recognition ☐ Ability to access employee training content

SUPPLY CHAIN

Required Features		Desired Features
Web Based Procurement System ☐ PO/Requisition ☐ Online approvals ☐ Vendor punch out ☐ Receiving ☐ Budget tracking ☐ Invoice matching ☐ Email notification ☐ Reporting ☐ Vendor spend tracking	☐ Online Bidding ☐ Reverse Auction ☐ Inventory Tracking (medical and office supplies) ☐ Contract Management ☐ Online RFP Tool – Example: https://www.capterra.com/p/129726/RFP365/	☐ Vendor Financial Health Analysis ☐ Vendor Portal 　☐ Registration for potential vendors 　☐ Assessment of current vendors by Mountain Park Staff 　☐ Vendor References

SaaS Statement of Service

Attach a sample Software as a Service (SaaS) Statement of Service proposal with your response that would meet the service needs of Mountain Park. The Statement of Service needs to include, but is not limited to:

- o Services Description
- o Statement outlining the customer's ownership of the data and the ability to retrieve / export data
- o Authorized Users and Services Fees (Implementation, software subscription fees, maintenance, support, service, etc.)
- o Storage Threshold(s)
- o Technical Support
    - Request for Technical Support
    - Problem Severity Levels for Response and Resolution
- o Technical Support Problem Severity Levels
    - Problem Severity Levels
        - Description of each Level
        - Request Response Time per Level
        - Request Resolution Time per Level
- o Customization / Integration Services
- o Training Services
- o Service Levels
    - Availability Service Level
        - Definitions
        - Service Level Standard
        - Calculation
        - Performance Credit
        - Example Calculation
    - Services Response Time Service Level
        - Definitions
        - Service Level Standard
        - Calculation
        - Performance Credit
        - Example Calculation
    - Technical Support Problem Response Service Level
        - Definitions
        - Service Level Standard
        - Calculation
        - Performance Credit
        - Example Calculation
    - Subscriber Satisfaction Survey Service Level
        - Definitions
        - Service Level Standard
        - Calculation
        - Performance Credit
        - Example Calculation

SECTION 3: PROCUREMENT REQUIREMENTS & EVALUATION

3.1 SUBMISSION REQUIREMENTS

Respondents shall submit proposals to the SPC via email sourcing@mphc-az.org
No faxed copies will be accepted. Emailed proposals should include "Mountain Park ERP RFP" in the subject line. To ensure consideration, proposals must be submitted by the deadline and Respondents are encouraged to verify receipt with SPC. Proposals received after the deadline will not be considered. Proposals must be in Microsoft Word or PDF format and cannot exceed 10MB. Incomplete responses may not be considered.

3.2 QUESTIONS/REQUESTS FOR CLARIFICATION

All inquiries, whether relating to the RFP process, administration, deadline or method of award, or to the intent or technical aspects of the RFP, must be emailed to SPC. Please refer to the specific page of the RFP being questioned (i.e. page and section). All inquiries must be received by the deadline for Questions/Requests for Clarification identified in the Schedule.

3.3 RESPONDENTS' PRESENTATIONS

Following the initial review and screening of the quotes, several Respondents may be invited to participate in the final selection process, which may include participation in presentations and/or submission of any additional information as requested by Mountain Park. Presentations can be done in person at the Mountain Park Central Office or by Teleconference. Mountain Park reserves the right to waive presentations altogether and select a successful bidder based upon submissions only.

3.4 EVALUATION CRITERIA

Initial Evaluation Criteria

Mountain Park will evaluate vendors' proposals based on the completeness and quality of their responses to all sections.

Description
Qualifications & Experience
Functional Systems Proposal
SaaS Services Proposal
Service & Maintenance Proposal
Performance Proposal
Implementation Proposal
Contractual Proposal
Price Proposal

Final Evaluation

Once a short list of vendors has been invited to continue with the process, other vendors will be notified. The short list of vendors will be engaged to demonstrate their products; based on their performance in the demonstration, references and, if Mountain Park desires, site evaluations, vendors will be asked to participate in a best and final process.

Element
Initial Evaluation Criteria (Table Above)
Demonstration
References / Site Evaluation

3.5 SCORING OF PROPOSALS

Mountain Park will score all proposals on a "PASS" or "FAIL" basis.

3.6 REJECTION OF PROPOSALS

Mountain Park reserves the right in its sole discretion to reject any or all proposals in whole or in part. All proposals will be reviewed for completeness of the submission requirements. If a proposal fails to meet a material requirement of the RFP, or if it is incomplete or contains irregularities, the proposal may be rejected. A deviation is material to the extent that a proposal is not in substantial accord with RFP requirements. Mountain Park reserves the right to award any contract to the next most qualified firm, if the successful application does not execute a contract within 30 days of notification of award selection.

3.7 AFFIRMATIONS

In order for their proposal to be considered, Respondent and its employees shall not be excluded by the U.S. Office of Inspector General ("OIG") OIG. As this SOW will be supported, at least in part, by federal funds, Mountain Park will require the successful Respondent to make certain affirmations – including that neither it, nor any of its employees, are subject to exclusion by the OIG – and Respondent shall be required to inform of any such notice which will be fully outlined in the contract. Such affirmations and attestations are requirements and failure to execute shall constitute a withdrawal.

3.8 CONTRACTUAL DOCUMENTS

The successful Respondent will enter into a contractual agreement with Mountain Park following notification of award selection, which may include a required Business Associate Agreement ("BAA"), Non-Disclosure Agreement ("NDA") and a Master Services Agreement (MSA).

3.9 SUPPLIER DIVERSITY

 Mountain Park encourages supplier diversity and seeks to provide opportunities for a broad spectrum of diverse suppliers to compete for our goods and services.