



# RFP for Workforce Scheduling

## 1. Introduction

### *1.1. Purpose of Document*

This Request for Proposal (RFP) is to identify Columbia Valley Community Health's current and future needs as it relates to Workforce Scheduling. It also contains specific requirements to be met by the new proposed solution. The main objective of this project is to select a new business partner to implement this software and help us address any future needs.

The solution should support the business processes of Columbia Valley Community Health – Informatics, Operations, and Payroll.

Vendors have to respond to the price component of this RFP for the following:

- Software Acquisition and Installation
- Implementation Services
- Interface costs and support
- Projected ongoing costs for upgrades and maintenance

The vendors are required to review this document and submit their response as per the schedule included in this document.

### *1.2. Confidentiality*

This RFP, plus any other documents released, information provided, discussions, etc., as part of the selection process, are strictly confidential and should not be divulged to anyone who is not directly involved in preparation of the response. Additionally, all information within this proposal or gained during the RFP or other processes will remain confidential by the vendor. No information or publicity will be allowed to any third party unless specific written authorization is obtained from Columbia Valley Community Health.

It is a condition of this RFP that the information provided herein is for the purpose of allowing vendors to submit proposals to Columbia Valley Community Health. It may not be used in any other context nor revealed to any other party not directly involved in the submission of a proposal in accordance with the terms of the specification.

### *1.3. Terms and Conditions of this Proposal*

#### *1.3.1. RFP Responses*

The closing date for receipt of the proposals is: September 31, 2016. Response to the RFP shall be delivered electronically to: Megan Middleton at [mmiddleton@cvch.org](mailto:mmiddleton@cvch.org).

### 1.3.2. Preparation of Responses

The preparation and submission of the proposal shall be made without obligation to acquire any items included in the proposal, or to discuss the reason why the proposal is accepted or rejected. Columbia Valley Community Health will notify acceptance or rejection in writing to the vendor via email.

The requirements specified in this RFP reflect those presently known. Columbia Valley Community Health reserves the right to vary, in detail, the final requirements.

Columbia Valley Community Health will not be responsible for or pay any expense incurred in the preparation of any proposal or in Columbia Valley Community Health's evaluation of it. Columbia Valley Community Health may require that all or part of the successful proposal be included in the contracts.

All prices shall be consistently in US dollars and all unit prices, charges and totals should be inclusive of tax and shipping.

Respondents should provide a clause by clause response to the RFP as specified.

General information, which is not specifically requested, should be attached separately and clearly labeled "**Supporting Material**". Respondents should also be available at a mutually agreed upon date to present either live or remotely all RFP items on a demo system to verify functionality.

### 1.3.3. Contract

This document does not constitute an offer to sell, or a solicitation of an offer to purchase. Columbia Valley Community Health reserves the right to accept all or part of the proposal. Columbia Valley Community Health requires that contracts covering the provision of services and equipment requested in this RFP be negotiated to the satisfaction of Columbia Valley Community Health. All vendors are required to acknowledge that they agree to the conditions set out in this section.

## 2. Business Background

### 2.1. Columbia Valley Community Health

Columbia Valley Community Health is a Federally Qualified Health Center (FQHC) that provides Healthcare services for the entire family in Wenatchee, East Wenatchee and Chelan, WA. Medical Services include acute and chronic disease care, maternity care, nutrition services, WIC and community outreach, diabetes case management, radiology, and pharmacy. The dental program offers full dental care for children and emergency care for adults who are CVCH patients. Behavioral Health services include adult and children's behavioral health care, case management and 24-hour crisis services. CVCH serves more than 22,000 individual patients in Chelan and Douglas counties. Private insurance is accepted and a sliding fee scale is available as needed.

Columbia Valley Community Health has currently 230 employees with growth opportunities.

## 2.2. Columbia Valley Community Health – Informatics

Columbia Valley Health Informatics Workforce Analyst is responsible for:

- Provider Scheduling
- Nurse Scheduling
- Medical Assistant Scheduling
- Medical Staff PTO
- Weekly Schedule Analysis
- Schedule Demand Analysis and Planning

Columbia Valley Health medical staff is comprised of the following:

- 50 Medical Providers
- 15 Nurses
- 35 Medical Assistants
- 8 Patient Services Staff
- 20 Call Center Staff

## 3. Systems

### 3.1. Current Systems

The CVCH organization utilizes:

- Athenahealth Electronic Medical Records
- Snap Scheduler
- Ultipro Time and Attendance
- Ultipro HRIS (Payroll)
- Microsoft Excel

### 3.2. System Interfaces

The new workforce scheduling software must interface with

- Ultipro Time and Attendance, OR
- Ultipro HRIS (Payroll)

## 4. Statement of Business Specifications

<b>Note:</b>	
SD – Standard	Requirement is standard to application software; no modification needed.
MC – Moderate Change	Application software will satisfy this requirement with moderate modification.
SC – Significant Change	Significant customization is needed to accomplish the stated objectives. Add on module is needed that will integrate with system.
NA – Not Applicable	Application software does not support requirement or optional requirement.

#### 4.1. Function Specifications

#	Description	SD	MC	SC	NA	Comments
1	Multi-User administrative access					
2	Ability to assign permission levels (permission matrix: unlimited roles, unlimited permission levels)					
3	Intuitive navigation and filters					
4	Ability to view all schedules (past, current, future) across all locations / departments as an administrator, manager, supervisor, etc.					
5	To their own schedule and see schedule notes					
6	Allow staff to view other team member's schedules					
7	Ability to view approved time-off					
8	Ability to integrate schedule with other useful programs or apps (i.e. outlook, mobile, etc.)					
9	Ability to view schedules off-site by staff					
10	Ability to link schedules to MyHub					
11	Demand Planning (provider hours, encounters, shifts, etc.)					
12	Ability to easily create and view schedules without posting / pdf'ing each change					
13	Ability to easily make changes to schedules and notify staff					
14	Ability to make changes to a provider schedule and notify appropriate support staff supervisor of the change					
15	Ability to create open shifts for staff to view and pick up / allow staff to pick up or trade shifts					
16	Ability to share resources across locations or jobs without a separate schedule					
17	Ability to support multi-location / multi-reason shifts (i.e. site, department, location, reason=provider, etc.)					
18	Labor hour and shift forecasting for support staff based on providers working (and volume of encounters)					
19	Access to data for customized reporting/analytics					
20	Access to data to create audits between Athena and Scheduling Software to identify discrepancies in schedules					
21	Ability to integrate with third party time management software					
22	Ability to import/export data easily (and/or open API)					

#### 4.2. Optional Requirements

#	Description	SD	MC	SC	NA	Comments
1	Preferably SQL server, on-premise solution, If cloud-based, direct SQL access					
2	Support test environment without additional licensing/cost					
3	Training environment					
4	Ability to track changes to schedules (record user, change, date/time stamp)					
5	Effective, efficient customer support team					
6	Ability to view and edit schedules off-site by administrators					
7	Robust front-end reporting					
8	Real-time schedule data analytics based on what is in the schedule (and, possibly, 'what-if' scenarios)					
9	Integrate with EMR for demand planning					
10	Positive client references					
11	Provides visual clarity to end user (i.e. looks modern, intuitive, color coding, etc.)					
12	Position control management: track positions separate from employee, track vacancies, etc. (possibly?)					
13	Ability to view pending time-off					
14	Ability to submit time-off requests along with ability to approve and manage					
15	Ability for schedule to update automatically with approval, cancellation, changes, etc. to time-off					

## 5. Technical Requirements

#	Description	Comments
	Architecture of the system must support virtual servers, windows server 2012, Windows 7 64bit Professional	
	The data will reside in a 2012 or newer MSSQL Server. If data isn't hosted locally, then a data feed must be provided for data warehousing purposes.	
	There must be a data dictionary or entity relationship diagram (ERD) available for custom reporting using third-party software.	
	Does the system require any proprietary hardware of a specific type or from a specific manufacturer? If so, please describe.	
	Please describe the system capacity for expansion (growth, scalability).	
	Does the system require any other computer software of a specific type or from a specific provider? If so, please describe.	
	How often are updates released? Please provide details about updates - (i.e. system, critical, scheduled). How are updates to be administered?	
	Please describe the implementation process, including length of time.	
	Please describe any and all customization that is required to meet the specifications outlined in this RFP	
	How is backup/recovery accomplished?	
	Licensing must allow a separate test environment. Please describe any limitations of the test environment installation.	
	What are your recommended and minimum required storage and server specifications? Please provide details.	

## 6. Vendor Requirements

### 6.1. Supplier Profile

All vendors must give a comprehensive profile of their organization in the following format and order.

#### 6.1.1. Organization

'Organization' concerns the structure and size of the company both in terms of its head office and other worldwide regional locations.

- Please provide information as to whether the organization is independent or part of a larger conglomerate. If the latter, please provide details on the holding company.
- Please provide corporate mission statement and strategic direction of the product. Also, please present the long term plan for addressing emerging technologies.
- Please provide information of any company that merged with or was purchased by the organization.
- Please provide information of any alliance or affiliation that with which the organization partners (e.g., tool or equipment supplier, standard groups, industry groups).
- Please provide information on the organization statistics (e.g., geographic distribution, market share, reputation, company highlights, etc.).
- Please provide information on your organization's performance against others in the industry.

#### 6.1.2. Product

'Product' concerns some basic information on the products of the company:

- All products being marketed
- How long the products have been in the market
- Compatibility of different products marketed
- Who and where was the product developed
- Platform the products are running
- Connectivity strategy for product proposed

#### 6.1.3. Location

'Location' concerns the location and size of operations at the head office and any regional offices.

For each location please state:

- Number of employees by function (technical and non-technical)
- Whether the offices are wholly owned subsidiaries of the main head office or if it is a third-party managed operation (VARs)
- Also indicate the office from where an implementation would be managed

#### 6.1.4. Growth

'Growth' concerns the manner in which the company has progressed since its inception. Please provide information:

- The year when the company was first established. The place where the company was first established.
- The size of the company per year since its inception in terms of locations and staff numbers and within this, the number of consultants.
- If the company has been in operation for a number of years, please summarize up until the last five years, and then provide detailed information from this period.
- The history in sales and consulting revenue over the last five years: product sales, personal growth (local, regional and global)

#### 6.1.5. Experience

'Experience' concerns the relative experience the vendor has in terms of an implementation of this size related to the business activity and distance from the most local regional office. Please provide information as to the experience of your consultants and retention rate of your key support people in the last two years.

#### 6.1.6. Reference Sites

'Reference sites' concerns the location and relative suitability of sites where the package is already implemented and is currently operational. Please provide:

- For each reference sites, please provide the following:
  - Client company name
  - Client contact person
  - Client address (street, city, country, post code), email address, telephone and fax number
  - The package or module that was delivered
  - The date of the delivery

For reference locations whose software applications most closely match Columbia Valley Community Health requirements, please outline the business activities carried out at these sites and their use of your package. Please indicate the period of time each site has been in operation with the designated package and the degree of customization that was required.

#### 6.1.7. Other Information

Please also provide us with any other information which you see as relevant, specifically any known weakness that the product has in terms of functionality or implementation/training requirements.



## 6.2 Maintenance and Support

Vendors are required to provide the following information related to the support and maintenance of the proposed solution.

- Software maintenance charges and the spectrum of activities covered under such maintenance contracts (new release, bug fixes, etc.)
- Software support availability (Help Desk, hotline, etc.) and duration for which they are available
- Response time to support inquiries from Columbia Valley Community Health
- Standard hours during which support will be provided + out of hours support options and costs
- Number of staff in the software support team
- Frequency at which new versions of the software are released
- Release date for the first version of the software

## 7. Proposal Response Format

This section outlines the format in which the suppliers are required to respond to this invitation. All suppliers will be required to provide the information as specified. Any other information that may be relevant to our decision-making process must be supplied as addenda.

### 7.1. Summary of Proposal

The RFP document must have a summary section containing the following information:

- Name of the package(s) being offered, version number, etc.
- Broad functional fit to the specifications in the Statement of User Requirements.
- Hardware platforms recommended and alternatives
- Application environment.
- Number of sites where package is implemented. Number of sites for the version proposed.
- Approximate cost of implementation broken down by:
  - Software Acquisition and Installation
    - Application Software
    - Data Access Software
    - Database Software
  - System Management Software
  - Development/Testing Software
  - Hardware Acquisition and Installation (if necessary)
    - Application/Database Server
    - Backup Server
- General Project Cost (consulting, travel expense, etc.)
  - Installation
  - Customization
  - Maintenance and Support
  - Other Costs

**Summary of Strengths of the Recommended Solution:** It is the vendor's responsibility to highlight all costs related to the implementation of their solution. Key components that are required but not quoted for will be the responsibility of the supplier.

## 7.2. Compliance to User Requirements

Vendors should set out clearly in their proposal all information requested. The proposal should follow the same numbering system as this RFP. Vendors should respond to each requirement with a SD (Standard), MC (Moderate Change), or SC (Significant Change) answer.

The definitions are as follows:

- **SD** Requirement is standard to application software no modification needed
- **MC** Application software will satisfy this requirement with moderate modification (to be accomplished within two days)
- **SC** Significant customization (beyond two days) is needed to satisfy the requirement
- Where a specific requirement cannot be fully met, or an alternative solution is proposed, comments should be included (e.g., the cost of basic tailoring, how much time is needed, etc.)

## 7.3. Cost

To assist Columbia Valley Community Health in the evaluation and analysis of the costs associated with the proposal, vendors should present their pricing. It is expected for the vendor to provide the application software (including third party software wherever applicable), database integration services and consulting. The vendor may at their option include pricing for hardware as outlined in the requirements. Each heading should be expanded as required to show each item and clearly identify what is included within the associated charge. The charges should be separated into one-time costs and ongoing charges.

It is expected that all charges and costs applicable to this proposal will be included in this section including, for example: handling, transportation, installation, training, maintenance and support, software upgrade, tools, travel, accommodations, and any other item that could be interpreted as the real cost of procurement and any ongoing expenses due to the vendor. Costs are to be provided in US Dollars. Software costs should highlight the difference between standard core licenses, modules, and enhancement costs and third party software licenses. Wherever a vendor is supplying items of a different manufacturer, the manufacturer and model numbers must be indicated.

In this section, vendors are requested to provide details on the equipment required as a platform for the proposed system. Columbia Valley Community Health requires that vendors provide estimates for the capacity and costs of all equipment for the proposed system.

Any charges applying to the proposal should be included with a full and itemized description. All costs and prices quoted in the proposal are assumed to be valid until implementation is completed.

## 7.4. Contracts

The vendors must indicate nature of contracts and agreements they are willing to enter into. The information to be provided includes:

- Sample contracts
- Payment terms - details of payment settlement options
- Period for which the price quotes will hold (6 months preferred)
- Guarantees against the system non-performance
- Penalty clauses
- Any other vendor constraints