

Request for Proposal & System Selection

Consulting Services Overview for Prospective Clients

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GENERAL HEALTH SOLUTIONS

Project and Management Consulting for Healthcare and Health Related Enterprises

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System selection projects will identify optimal systems for client specific needs. These are either replacement systems to leverage new technology or new systems to support new or existing programs. Whatever the driving force, any change in systems will introduce risk to the organization, and risk management begins in the system selection process.

Selection efforts may be complicated by a search for a 'perfect' solution. Rarely does a 'perfect' solution exist. General Health Solutions recognizes that organizational performance is achieved by a balance of technology with operational practice, human resources, and the environment in which the work is performed. A global view of these variables in the selection process will enable identification of opportunities in each area to facilitate a balanced solution.

Driving forces for new systems are usually a combination of technical and operational needs. Regardless of the primary driving forces, introduction of new systems will impact operations. System selection priorities are established by identifying performance improvement goals and the shortcomings of the current operation. The implication is that functional requirements are distilled from an understanding of both current and future state systems, operations, and issues. Changes in systems may impact areas other than the primary concern in unanticipated ways. A well coordinated system selection process should account for the primary concerns and potential 'side effects' as well.

Beginning with the selection process, initial planning for the implementation approach and desired outcome are addressed to insure that the final result of the subsequent implementation is positive in all affected areas. A well coordinated selection process will facilitate the implementation of the selected system in a variety of ways. A few key examples are:

- Formulation of organizational objectives
- Identification of key constituents for implementation working teams
- Organizational awareness of operational issues & opportunities
- Preliminary definition of future operating and systems models
- Preliminary assessment of implementation and organizational risk.

General Health Solution's RFP and System Selection services are outlined below. GHS also offers Pre-Implementation Assessment & Planning Services to identify and mitigate risk prior to implementation projects. Prospective clients facing complex systems projects are strongly encouraged to complete this second exercise prior to beginning implementation. Specific client needs for consulting support in their endeavors may vary. General Health Solutions tailors all engagements to address client specific need and promotes knowledge transfer of the process and methodology employed.

Outline of Request for Proposal Formulation and System Selection Services

Project Start-Up

- Draft Project Charter Established.
- Scope & Timeframe Set into the Project Plan.
- Project Leadership & Participants Identified.
- Project Kick-Off Meeting.

Establish Client Specific Project Tools

- Project Portal
- Functional Requirements Template
- Operational Model Template
- System Model Template
- RFP Template
- RFP, Demo and Site Visit Scoring Templates

Preliminary Needs Determination

- Current Functional Environment
- Current Application Inventory & Technical Environment
- Key Objectives of Anticipated System Solution.
- Preliminary Research on Possible Vendor Solutions
- Preliminary Draft of Functional Requirements

Determine Client Specific Functional Requirements

- Interview Key Constituents on Current Operations and Operational Issues/Needs
- Interview Key Constituents on Current Managerial Functions And Issues/Needs
- Determine Data Integration Requirements & Validate W/ It

Build a Model of Current and Desired Future Operations

- Create A Model Of Current Operational Tasks (*with notation of issues*)
- *Note: The level of detail required in the current model will vary based on client needs and available system solutions in the marketplace.*
- Team Review of Model & Findings from Current State Assessment.
 - o *Include Potential Alternatives For Consideration If Available.*

Cont'd: Build a Model of Current and Desired Future Operations

- Identify Interventions Needed to Achieve Opportunities and Address Issues.
 - o Procedure/ Process Changes
 - o Refinements to Systems or Other Tools
 - o Training & Guidance to Process Participants.
- Document Proposed Changes and Create Revised Process Flow Diagrams.
- Team Review and Agreement on Refinements.
- Identify Reports Needed to Sustain The Model
- Create a List of Functional Requirements to Support Desired Features for:
 - o User Operations & Reports
 - o Management Operations & Reports
 - o Data Integration
 - o System Implementation & Maintenance

Define Additional Points of Vendor Inquiry for RFP

- Define the Technical Requirements
- Determination of Legal Requirements for Proposals
- Determine the Legal Requirements for Contracts
- Determine the Parameters for Corporate Due Diligence.

Establish the RFP & Selection Process

- Define Process for Vendors' Submission Proposals
- Establish the Selection Process & Scoring Tools
- RFP Scoring
- Demonstration Scoring
- Site Visit Scoring
- Scoring Summary

Establish the Final RFP Document

- Compile All Chapters
- Committee Review of RFP
- Committee Determination Of Target Vendors

Solicitation of Proposals

- Distribute RFP
- Manage Vendor Requests For Clarification & Responses

Evaluation of Vendor Proposals

- Distribute Responses & Scoring Tools
- Collect Scores & Tabulate

Initial Selection

- Core Team Meeting: Review RFP Scores & Set Recommendations.
- Steering Committee Meeting: Review Recommendations & Initial Vendor Selection

Vendor Demonstrations & Evaluations

- Logistical Preparations
- Vendor Demonstrations & Evaluation of Demonstrated Functionality
- Collect Scores & Tabulate

Second Selection

- Core Team Meeting: Review RFP Scores & Set Recommendations.
- Steering Committee Meeting: Review Recommendations & Vendor Selection For Demonstrations

Site Visits to Installed Client Sites

- Logistical Preparations
- Site Visits & Evaluation
- Collect Scores & Tabulate

Compilation of Requirements and Potential Client Risks

- Preliminary Gap Analysis & Document Enhancements Needs for Contract
- Prepare Summary of All Scores and Risks.

Final Selection

- Core Team Meeting: Review All Scores & Risks, Set Recommendations.
- Steering Committee Meeting: System Selection Decision

Functional Specification of Software Enhancements

**(Included if client plans to contractually bind vendor to deliver functionality not included in standard application(s)).*

Begin Planning Process for Implementation

- Pre-Implementation Risk Assessment
- Vendor/ Application Specific Implementation Plan
- Vendor/ Application Specific Operational Models
- Vendor/ Application Specific Technical Models
- Formulation of Implementation Project & Team.

Success Factors

- Commitment of Top Leadership
- Access to Organizational Participants
- Access to Operational and IT Documentation
- Objective Process with Transparency for Key Constituents