Salesforce Development Services

Request for Proposal

RFP Issue Date: June 28th, 2018

Proposals Due: July 19th, 2018

Chesapeake Regional Information System for our Patients

7160 Columbia Gateway Drive, Suite 230

Columbia, Maryland 21046

Contents

Overview and Objective

CRISP Overview and Background

Chesapeake Regional Information System for Our Patients, Inc. (CRISP) is an independent not-for-profit membership corporation that operates a health information exchange (HIE) serving the Maryland and District of Columbia region. CRISP, which is a private entity chartered and governed to pursue health IT projects best pursued cooperatively, is the state designated HIE for Maryland. Its participants include each of the 48 acute general care hospitals in Maryland, all eight hospitals in the District of Columbia, 29 hospitals in WV as well as numerous other facilities and providers of care.

CRISP leverages the Salesforce (SFDC) platform to manage many different aspects of its business. The Sales (*aka Outreach*) team uses SFDC as a traditional selling tool, tracking Leads and working Opportunities, which are ultimately passed to the Operations team for account setup. The Operations team uses SFDC to manage system setup procedures and to track user account information. SFDC serves as a consolidated repository of all user access in downstream systems, and this record is maintained manually.

SFDC has enabled CRISP to automate portions of its onboarding and Audit practices. The Onboarding process walks new users step-by-step through CRISP's requirements for access, while the Audit page is provided to each practice to periodically verify their users on file with CRISP.

Scope of Work

CRISP is rapidly growing and at times we need support to meet certain new challenges. Our primary purpose for this engagement is to hire developers for short term projects (2-3 weeks) based on the new requirements that might arise. In addition to that some other services that might be required are:

- Salesforce, Sales Cloud system maintenance

- Focus on reducing administrative overhead and maintenance costs associated with maintaining multiple systems on multiple platforms and enhancing reporting capabilities, accuracy and accessibility.
- Create a solution that will enable ease of communication and data sharing with external organizations as driven by business and policy needs.

Criteria for Selection

RFP Applicants will be evaluated based on the following criteria:

EVALUATION CRITERIA

Description	Percentage
Provider's direct experience servicing Salesforce.	25%
Firm's number of years certified as a Silver Level or higher Salesforce partner. Client satisfaction rating as measured by Salesforce.	20%
Cost	55%
Total	100%

RFP Process and Submission Instructions

RFP Process overview

Based on responses, CRISP will select multiple vendors for in-person/webinar interviews and conduct reference reviews. Following the interviews, CRISP will issue refined specifications and ask selected vendors to provide a final response and financial bids.

CRISP expects to issue the final vendor award approximately six weeks months after issuance of this RFP.

RFP Timeline

The figure below, represents CRISP's best-estimated schedule for this procurement. All dates, including the contract start date are subject to change.

Figure 2: Procurement Timetable

Event	Approximate Dates	Notes
CRISP Issues RFP	June 28th 2018	Any proposal updates will be issued on the CRISP website
Clarifications and Q&A	Ongoing	Questions may be submitted to Praveen.singh@crisphealth.org
Vendor RFP Responses Due to CRISP	July 19th 2018	Proposals must be emailed by **5 pm(EST) to Praveen.singh@crisphealth.org**
Follow-Up with Vendors	July 30th 2018	CRISP will contact vendors as needed
Vendor Selection and Contracting	August	CRISP will contact selected bidders to initiate contracting process
Contract Execution	August	Contract will begin upon execution

CRISP will work in good faith to provide adequate and equal opportunity for all participating vendors. However, CRISP reserves the right to adjust or modify the Procurement Timetable at any point, as deemed necessary, in the process.

Bidders Conference and Requests for Clarification

A bidder's conference will be held on **July 9th between 1300 and 1400** HRS. In addition, CRISP will routinely answer the questions related to this procurement. Please email questions and requests for clarification to: Praveen Singh: **Praveen.singh@crisphealth.org**

Terms and Conditions and Confidentiality

All responses become the property of CRISP and will not be returned to responders. Responses may be disclosed to CRISP and CRISP advisors as deemed appropriate by CRISP. All pricing information will be treated confidentially.

CRISP expressly reserves the right to make any decision regarding future direction or future technology partners. This includes the right to not award a contact pursuant to this RFI/RFP process. CRISP also reserves the right to:

- Accept or reject any and all proposals or parts of proposals received in response to this RFP
- Amend or modify the RFI/RFP or cancel this request, with or without the substitution of another RFI/RFP
- Waive or modify any information, irregularity, or inconsistency in proposals received
- Request additional information from any or all respondents
- Follow up on any references provided
- Negotiate any terms of contract or costs for any proposal
- Request modification to proposals from any or all contractors during review and negotiation
- Negotiate any aspect of the proposal with any individual or firm and negotiate with multiple individuals or firms at the same time

Submission of a proposal in response to this RFP constitutes acceptance of all the conditions of this procurement process described here and elsewhere in the RFP.

A bidder receiving a positive response to their RFP proposal should be prepared to immediately begin negotiation of final terms based on the RFP and other mutually agreed-to terms and conditions, provided that terms described by bidder in their response may be rejected in whole or in part and/or otherwise negotiated by CRISP in the contracting process. In addition, a positive response from CRISP does not assure that a contract will be entered into; CRISP may discontinue negotiations with a bidder at any time, at our sole discretion. Until and unless a formal contract is executed by CRISP and responder, CRISP shall have no liability or other legal obligation to a responder whatsoever, relating to or arising from this RFP, the RFP process, or any decisions regarding pursuit of a formal solicitation.

CRISP will hold responses as confidential.

In no event will CRISP be responsible for damages or other remedies, at law or in equity, arising directly or indirectly from any decisions or any actions taken or not taken in response to or as a result of this RFP or response by a vendor. All responder's costs

from response preparation, response delivery, and any negotiation will be borne by the responder.

Submission Instructions

Responses to this RFP should be submitted by **July 19th 2018 before 5 PM(EST)**to **Praveen.singh@crisphealth.org.** Vendors should submit the proposal as a single file containing all response and supporting materials.

Questions to Vendor

Company Overview

Provide a company overview including a description of similar projects. Vendors selected for interviews will be asked for client references.

General and Technical Questions Responses

CRISP requests responses to all questions listed below, and all answers should be clearly provided within the context of the proposal and/or in their own separate section. All answers provided should be succinct in length to ease reviewer evaluation, while providing sufficient depth to answer each question thoroughly.

CRISP will assume that any non-answer will indicate that any proposed company or technology will be unable to provide or unwilling to disclose a solution to the question, and this may negatively impact CRISP's perception of the overall proposal. Inability to provide a response to any question will not immediately disqualify a proposal from consideration.

Please NOTE: All responses, assertions, and commitments made in this proposal will be part of the contract.

1. Share an overview of your sales force practice including information such as the number of certified developers, customer depth and tenure in the market.

2. Please detail a previous engagement in which you were able to identify previous unexplored areas for improvement and how do you work to align with your customer's needs.

3. How do you ensure that your code is of high quality?

4. What is your experience working with a team within your organization, within your customer's organization, or with third-party consultants? Which is your preferred method for successful project implementation?

5. Why is your company uniquely suited to advise CRISP on Salesforce improvements and implementation? Do you have any experience in healthcare industry? If yes, provide a success story.

6. How would you handle tasks that you are not experienced with? For example, if your consultant is not a developer how would they handle the need for custom code?

7. Have you published an application to AppExchange? If yes, how many certifications do you have on the AppExchange and what is the CSAT (Customer Satisfaction Score) on the AppExchange?

8. Besides, salesforce what other capabilities does your firm have? What percentage of the vendor's revenue are Salesforce project?

Cost

Hourly Rates
The vendor should provide hourly billing rates as per the category (Business Analyst, Developers, QA, and Project Manager)

Expenses
The vendor should also provide an estimate of expenses associated with a typical project, as a percentage of total investment.

Other CRISP borne costs
If the solution requires additional systems or capabilities not included in the vendor's proposal, those should be delineated in the final tab of the spreadsheet in any form you find suitable. For example, the vendor's solution requires 1 SQL Server license; with the expectation that CRISP will purchase the license.