



Request for Proposal 2021

For The Velatura Qualified Vendor Status

*HEALTH INFORMATION TECHNOLOGY Consulting Services
RFP 2021-001*

Contact email address: rfp@velatura.org

Any attempt to communicate with a member of Velatura Services team, its staff, existing contractors or Board members regarding this RFP using any means other than the above contact email address may result in instant disqualification.

Estimated Key Timeline Dates (more complete [Calendar of Events](#) is in section 1.2):

Key Milestone	Date
Public Release of RFP	December 20, 2021
Deadline for questions to the Company	January 28, 2022
All questions and answers published by the Company	February 14, 2022
Final date to submit proposals	February 25, 2022
Anticipated contracts with approved vendors	Within 2 weeks after acceptance

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1. General Information

Velatura Services is a national leader in delivering interoperability solutions and professional services. Our mission is to creatively connect and align people, organizations, technology, and ideas to improve healthcare and program outcomes, eliminate waste, and reduce costs.

Our company is a trusted partner to public and private sector organizations seeking to streamline and scale secure exchange of clinical, administrative, and person-level data across organizational boundaries and state lines. Our Customers include but are not limited to health information exchange organizations, commercial and Medicaid health plans, national health systems, and federal, state, and local government agencies.

Velatura Services offers a continuum of services to our Customers ranging from deploying white-labeled information exchange platforms, delivering modular technology solutions, and providing operational support and professional services. We understand it requires a combination of technology, people, and process to solve for the interoperability and data exchange challenges in all industries, especially healthcare, and we are dedicated to meeting our Customers where they are at to help them find and follow their path to success.

This Request for Proposal (RFP) for Health Information Technology (HIT) Consulting Services is being issued by Velatura Services, LLC (the “Company”) with the intent to partner with professionals and organizations that share a similar mission and can help us serve our current and future Customers.

Offerors who meet the requirements outlined in this RFP and are selected by the Company may enter into a Master Services Agreement (MSA) to be considered a Velatura Qualified Vendor (VQV) receive future statements of work (SOW).

This RFP is arranged into the following sections at velatura.org/procurement:

- [Section 1](#): General Information provides a high-level overview of Velatura Services and a series of topics to help guide an Offeror in building an RFP response.
- [Section 2](#): Proposal Response Format provides a description of the physical response format and process
- [Section 3](#): Criteria for Selection provides a description of Eligibility Requirements and a summary of how the evaluation process will proceed, along with our intent to perform unbiased evaluations of all Offeror responses.
- [Section 4](#): General Terms and Conditions provides details of what the Company considers necessary to reach a fair and equitable contractual agreement.
- [Section 5](#): Proposal Sections describe in detail how the Offeror’s statement of capabilities and experience should be organized and what information is required to be included within the response as well as limits to the size of the response.

1.1 Purpose of Request for Proposal (“RFP”)

Velatura Services, LLC (“Velatura” or “Company”) is issuing this RFP for HIT Consulting Services to establish a list of pre-qualified vendors known as Velatura Qualified Vendors (VQVs). The purpose is to allow the Company to employ a flexible staffing model, leveraging VQVs, for our growing portfolio of HIT consulting projects.

Velatura is soliciting proposals that demonstrate the Offeror’s capabilities and qualifications in the services areas listed below to supplement our team and support our consulting projects. These projects include working with states, government agencies, health information exchanges, healthcare entities, and others to provide consulting services related to strategic planning and sustainability, operational support, and governance and stakeholder engagement. Offerors may respond to one or more service areas.

Approval of this RFP will result in VQV status for the Offeror, after completion of a Master Services Agreement (MSA) legal agreement. VQV status will enable the Vendor to receive future statements of work (SOW). The period of performance for all successful Offerors under the MSA is three (3) years.

HIT Consulting:

- Demonstrated consulting experience in HIT strategic planning and stakeholder engagement initiatives with states, other government agencies, health information exchanges, healthcare entities, health plans, and others.
- Strong understanding of HIT topics, including health information exchange (HIE), governance, technology, healthcare payment, quality improvement and data analysis, and other related topics
- Participation in national workgroups and initiatives that promote technology standards, interoperability, and emerging topics such as behavioral health sharing and social determinants of health (SDOH) data exchange
- Experience working with Centers for Medicare and Medicaid Services (CMS), Office of the National Coordinator for HIT (ONC), Centers for Disease Control and Prevention (CDC), or other Federal agencies on HIT topics, including funding requests, program delivery, and exploratory work.

Technical Design and Advisory Services:

- Knowledge of HIT vendors and technologies, including cloud-based exchange solutions
- Experience developing business and technical requirements based on stakeholder needs, policy and legal requirements, identified use cases, and available data sources
- Experience developing and architecting solutions to meet business requirements
- Subject matter expertise in health information technology, IT strategy, clinical informatics, data science, data analytics, data management, health policy

Staff and Program Support:

- Project management knowledge (PMP certified preferred)

- Experience managing complex health IT projects (e.g., clinical information systems, HIE)
- Experience with documenting requirements for health IT projects
- Demonstrated leadership skills and ability to manage diverse project teams
- Strong facilitation and communication skills

Other Support Area:

Offerors must apply for one of the above categories. However, Offerors may also apply for this category and include a description of additional areas of expertise and services that can be offered along with any relevant background and experience. Velatura will use this information to develop a better profile of expertise offered by successful Offerors.

1.2 Calendar of Events

Key Milestone	Date
Public Announcement and Release of RFP	December 20, 2021
Last date to receive questions from Offerors (if any)	January 28, 2022
All questions and answers posted on RFP website page	February 14, 2022
Proposal submission period begins	January 17, 2022
Final date to submit proposals	February 25, 2022
Company completes review and scoring of proposals and sends questions to each Offeror	January 24, 2022 - March 11, 2022
Optional bidders conference call(s) to clarify questions about proposals	February 7, 2022 – March 25, 2022
Offerors provide written response to questions (if any)	Within 1 week after questions from Company are received
Company completes final scoring of proposals	Within 1 week after Company receives Offeror’s responses to questions
Company provides RFP acceptance via MSA to VQV candidates	Within 2 weeks after final scoring is complete
Offerors complete MSA	Within 2 weeks of acceptance notice

1.3 Who may respond to this RFP

This RFP is open to all legal U.S. businesses and international businesses approved to work in the United States that possess the necessary qualifications criteria and comply with the submission instructions.

Subject to limitations imposed by Federal Law, finalists shall receive additional preference for being a minority-owned business, a woman-owned business, a businesses that meets the definition of a small business as defined by United States Small Business Administration (SBA), or a small business concern owned and controlled by veterans.

All individuals and entities seeking to assist the Company may be subject to the limitations imposed by the [Export Control Reform Act of 2018](#) and require the ability to successfully pass the appropriate background checks.

1.4 Scope

This RFP contains instructions governing the requested proposals, including the requirements for the information and material to be included; a description of the services to be provided; general evaluation criteria; and other requirements specific to this RFP.

1.5 Type of Contract

It is anticipated that the Company will enter into a series of MSAs to allow successful Offerors to obtain VQV status as a result of this RFP. SOW contracts are expected to be fixed fee or not-to-exceed time and materials.

1.6 Term of Contract

The term of the MSA will commence on the Effective Date of the MSA, and end three (3) years after the Effective Date. Each SOW contract is subject to approval by the Company and may be contingent on the Company receiving project funding.

1.7 Rejection of Proposals

The Company reserves the right, in its sole and complete discretion, to reject any proposal received as a result of this RFP.

1.8 Incurring Costs

The Company is not liable for any costs the Offeror incurs in preparation and submission of its proposal, in participating in the RFP process or in anticipation of award of the contract.

1.9 Questions/Communications about this RFP

Offerors should [email](#) all questions and communications to the Company in accordance with the instructions below and in accordance with the instructions on the RFP web page(s).

- If an Offeror has any general questions regarding this RFP, please visit the RFP website:
<https://velatura.org/procurement/>
- If the Offeror has additional questions, they must be submitted via [email](#) no later than the date indicated on the [Calendar of Events](#). The Company will post all questions and answers on the [RFP website](#).

To avoid a potential automatic disqualification, an Offeror shall not attempt to contact the Company, any Company staff, existing Company contractors, vendors, partners, or Company board members regarding the RFP during the full RFP period other than via email to: rfp@velatura.org.

The Company will post the answers to questions on the [RFP website](#) by the date stated on the [Calendar of Events](#). If the Company contacts an Offeror with a question or comment, the Offeror may respond, but only through the email address specified above.

All Questions & Answers as posted on the [RFP website](#) are considered as an addendum to, and part of, this RFP Document in accordance with [1.10 Addenda to the RFP](#). Each Offeror shall be responsible to monitor the [RFP website](#) for new or revised RFP information. The Company shall not be bound by any verbal information nor shall it be bound by any written information that is not either contained within the RFP or formally issued as an addendum by the Company via a posting to the [RFP website](#).

1.10 Addenda to the RFP

If the Company deems it necessary to revise any part of this RFP before the proposal response date, an addendum will be posted to the [RFP website](#).

It is each Offeror's responsibility to periodically check the [RFP website](#) for any new information or addenda to the RFP.

Answers to questions from the Question & Answers period will also be posted to the [RFP website](#) as an addendum to the RFP.

1.11 Response Date for Submitting Your Proposal

To be considered for selection, copies of proposals must electronically arrive on or before the time and date specified in the [Calendar of Events](#).

1.12 Legal Entity Responsibilities

MSA will require the selected Offeror to assume responsibility for all services offered in its proposal. The Company will consider the selected Offeror to be the sole point of contact regarding all contractual matters.

1.13 Proposal Contents

1.13.1 Confidential Information

The Company is not requesting, does not require, and does not wish to receive confidential or proprietary information or trade secrets included in Offeror's submissions in response to this RFP. Accordingly, except as provided herein, Offerors should not label proposal submissions as confidential or proprietary or trade secret protected. Any Offeror who determines that it must divulge such information as part of its proposal must additionally provide a redacted version of its proposal, which removes only the confidential proprietary information and trade secrets.

1.13.2 Use

All material submitted with the proposal shall be considered the property of the Company and may be returned only at the Company's option. The Company has the right to use any or all ideas not protected by intellectual property rights that are presented in any proposal regardless of whether the proposal becomes part of a contract.

Notwithstanding any Offeror copyright designations contained on proposals, the Company shall have the right to make copies and distribute proposals internally for its own internal use and to comply with any rule or order of any court of competent jurisdiction.

1.14 News Releases

Offerors shall not issue news releases, Internet postings, advertisements or any other public communications pertaining to work resulting from this RFP without prior written approval of the Company, and then only fully in coordination with the Company and with the Company's final edit/approval authority.

1.15 Offeror's Representation and Authorizations

By submitting its proposal, each Offeror understands, represents, and acknowledges that:

All the Offeror's information and representations in the proposal are material and important, and the Company may rely upon the contents of the proposal in awarding the contract(s). Any misstatement, omission or misrepresentation shall constitute fraudulent concealment of the true facts relating to the Proposal submission.

The Offeror has arrived at the price(s) and amounts in its proposal independently and without consultation, communication, or agreement with any other Offeror, potential Offerors, or any Company employee.

The Offeror warrants that it has not disclosed the price(s), the amount of the proposal, nor the approximate price(s) or amount(s) of its proposal to any other firm or person who is an Offeror or potential Offeror for this RFP, and the Offeror shall not disclose any of these items on or before the proposal submission deadline specified in the [Calendar of Events](#) of this RFP.

The Offeror has not attempted, nor will it attempt, to induce any firm or person to refrain from submitting a proposal for this RFP.

The Offeror makes its proposal in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.

To the best knowledge of the person signing the proposal for the Offeror, the Offeror, its affiliates, subsidiaries, officers, directors, and employees are not currently under investigation by any governmental agency and have not in the last four years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to bidding or proposing on any public contract, except as the Offeror has disclosed in its proposal.

The Offeror has not made, under separate contract with any member of the Company, any recommendations to any member of the Company concerning the need for the services described in its proposal or the specifications for the services described in the proposal.

The Offeror must provide written disclosure of any conflict of interest in connection with this procurement. This may include any contractual relationship with the Company or any past, present, or planned personal, professional, or financial interests that would create actual or perceived conflict.

1.16 Notification of Selection

The Company will notify selected Offerors via email or phone call to the contact provided in the response of its selection for negotiation of the MSA after the Company has determined, taking into consideration all of the evaluation factors, the proposals that best meet the Company's requirements, that the Offeror being notified is a candidate to become a VQV upon entry into a MSA. If the Offeror is not selected, feedback on the proposal response may be requested. This request should be sent to the email provided herein.

1.17 Use of Electronic Versions of this RFP

This RFP is being made available by electronic means. If an Offeror electronically accepts the RFP, the Offeror acknowledges and accepts full responsibility to ensure that no changes are made to the RFP. In the event of a conflict between a version of the RFP in the Offeror's possession and the Company version of the RFP, the Company version shall govern.

2. Proposal Response Format

2.1 Required Documents

Offerors must submit their proposals in the format outlined below including heading descriptions. To be considered each proposal must respond and conform to all requirements in this part of the RFP Document.

1. One-Page Proposal Cover Sheet
2. Capabilities Statement
3. Staffing Plan
4. Business References
5. Billing Rate Card
6. Master Service Agreement (MSA) Redlines – If applicable

Any supplemental support that the Offeror includes with their submission may not be reviewed.

2.2. Submission Format

Responses to this RFP should be submitted via [email](#) or electronically through RFP360 page no later than 5:00pm EST on the date indicated in the [Calendar of Events](#).

- For proposals submitted via [email](#), the RFP number and Offeror business name must be indicated in the Subject line. The required proposal documents and all attachments should be sent in PDF format.
- To access and respond to the proposal through RFP360, please contact Company via [email](#) with this request and Company will provide the appropriate invite to the given address. There is no cost to submit through RFP360.

2.3 Redistribution

The Offeror shall make no other distribution of its proposal to any other party. Each proposal page should be uniquely numbered for ease of reference.

For this RFP, the proposal must remain valid for at least 120 days from the proposal due date. If the Company selects the Offeror's proposal as a VQV, the contents of the selected Offeror's proposal will be attached to the agreement and become contractual obligations of the Offeror.

The Company reserves the right to request additional information which, in the Company's opinion, is necessary to assure that the Offeror's competence, number of qualified employees, business organization, and financial resources are adequate to perform work efforts according to the RFP.

3. Criteria for Selection

3.1 Qualifying Requirements and Nonconforming Proposals

The six (6) items set forth in [Section 2: Proposal Response Format](#) are the only proposal requirements that the Company will consider to be non-waive-able. The Company reserves the right, in its sole discretion, to (1) waive any other technical or immaterial nonconformity in an Offeror's proposal, (2) allow the Offeror to cure the nonconformity, or (3) consider the nonconformity in the scoring of the Offeror's proposal.

3.2 Offeror Responsibility

An Offeror must submit a responsive proposal and possess the capability to fully perform the contract requirements in all respects and possess the integrity and reliability to assure good faith performance of the contract. The Offeror Responsibility is to submit all the documents required in [Section 2](#) and to submit them by the deadline included in the [Calendar of Events](#).

3.2.1 Responsive Proposal

Proposals will be evaluated based on the following criteria and weights:

- Compliance with requirements listed in the RFP – Weight: 15%
- Alignment with requested scope of capabilities as defined in Section 1.1 – Weight: 35%
- Depth of experience – Weight: 30%
- Cost – Weight: 15%
- Minority Business Enterprise (MBE), Women Business Enterprise (WBE), small business as defined by United States Small Business Administration (SBA), or small business concern owned and controlled by veterans – Weight: 5%

In order for an Offeror to be considered responsive to this RFP and therefore eligible for selection for the VQV list, the total score for the submittal of the Offeror's proposal must be greater than or equal to 70% of the total possible score.

3.2.2 Capability to Perform

An Offeror must demonstrate sufficient capability to assure good faith performance of the contract as specified herein to be considered by the Company, in its sole discretion, for best and final offers or contract negotiation.

3.2.3 Evaluation Criteria and Process

The success of the overall the Company initiative and the Offeror's response will depend on the extent to which the Offeror's response can support the Company. A team of unbiased and qualified Company staff will review and evaluate submitted proposals in a timely manner. This team will score the various sections of the Offeror's response.

4. General Terms and Conditions

Contract terms will be discussed upon an Offeror being submitted to and approved by the Company as a candidate to become a VQV. The Company will notify in writing and send the MSA to successful Offerors approved as VQV candidates and will then begin discussion of the contract terms to execute the MSA.

The Offeror is expected to negotiate expediently, and in good faith, to reach a fair and equitable contractual agreement no later than 10 business days after receiving the standard MSA from the Company's Legal Department.

The MSA should contain provisions addressing terms and conditions typically found in a health care industry professional services agreement as well as any special terms and conditions which, by their nature, are necessary for the successful engagement with the Company (the "Expected Contracting Terms"). The MSA shall also contain mandatory Federal Acquisition Regulation (FAR) flow-down terms. FAR compliance requirements are mandatory, are non-negotiable, and are a condition of doing business with the Company.

5. Proposal Sections

5.1 Proposal Cover Sheet (Required)

Refer to Attachment A for the Offeror Proposal Cover Sheet and fill out the following information using the template provided:

- Offeror Organization Information
- Offeror Contact Information
- Service Areas Addressed in Proposal
- Additional Offeror Comments (optional)
- Minority-, Woman-, Veteran-owned business certification
- Date of Proposal Submission
- Offeror Principle with binding authority for the Offeror

5.2 Capability Statement (Required)

The Capability Statement is a description of the Business, which highlights prior experience especially as is relevant to the RFP. Two (2) page limit for each subject area selected.

5.3 Staffing Plan (Required)

Please provide your staffing plan that meet the qualifications as listed in Section 1.1. This should include an organizational chart, resumes, and list of responsibilities for each individual. After key personnel are assigned to a SOW and approved by the Company, the Offeror may not divert or

replace personnel without written approval of the Company authorized representative and in accordance with the procedures described below.

5.4 Business References (Required)

Provide a minimum of two (2) business references, including current contact information. **All lists of references should be limited to one page.**

5.5 Billing Rate Card (Required)

Offerors should use the standard rate card template provided in Attachment B to fill out rates for services indicated.

5.6 Master Service Agreement (MSA) Redlines (If Applicable)

The Company's proposed Master Service Agreement (MSA, "Agreement") is provided in Attachment C. The Company has taken a policy that it will not accommodate most changes to its Agreement. The Company will do what it can to accommodate reasonable requests for revision but asks that the Offeror not make changes to document itself. If the Offeror has items deemed absolutely necessary to move forward, The Offeror should provide a summarized list of proposed amendments for discussion as part of the proposal response.

5.7 Other Information

Offerors are free to submit additional information at their discretion, but please note that the information should fit within the pagination limits specified above. If the information exceeds those limits, it may not be reviewed.

THIS PAGE REPRESENTS THE END OF THIS REQUEST FOR PROPOSAL