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## Request for Proposal

Partner in Care Foundation (PARTNERS), San Fernando, CA, is seeking Salesforce development company to customize and integrate Salesforce for our Health Self-Management Service department to fit our unique business need.

PARTNERS receives multiple federal and private foundation grants for holding workshops that help qualified individuals with chronic conditions, develop skills to manage these conditions and live a healthier life.

PARTNERS is looking for a develop a Salesforce data base system to keep track of the grants, workshops, the volunteers who lead the workshops, and the participants. The system must also allow the collection of data such as attendees' demographics and workshop satisfaction surveys for reports due back to Grant owners and uploads to National Databases.

This is a one-time development project. Partner's goal is to start the project by March 25<sup>th</sup>, 2019.

### About the Partners in Care Foundation

#### Background

- Mission statement
  - To shape the evolving health system by developing and spreading high value models of community-based care and self-management.
- Organizational Goals
  - Innovate by creating or adapting community-based social service and wellness programs that address new target populations and leverage emerging trends in social service and healthcare delivery to meet the needs of consumers and payers.
  - Spread/scale effective service coordination, care transition, and evidence-based health and self-management models, programs and practices
  - Expand and enhance the effectiveness of the statewide Partners at Home Network for delivery of health self-management, wellness, care transitions, home and community-based care coordination – and make it self-sustaining
  - Be a national change agent for integrating healthcare with home and community-based services by promoting best practices and the value proposition to healthcare providers, payers, organizations and government agencies.
  - Build a strong, nimble infrastructure and culture, and sustainable financial resources to support the organizational mission and impact on the communities we serve.

- Strategies
  - Maintain and/or enhance existing business relationships
  - Expand cutting-edge healthcare contracts for Partners in Care.
  - Expand cutting-edge healthcare contracts for the Partners at Home Network and Health Self-Management.
  - Increase HomeMeds adoption through an active sales/marketing initiative and continued improvements to the IT platform, including expanding assessment as a related resource.
  - Expand consulting role to include helping healthcare organizations work with CBOs and to address social determinants of health.
  - Increase philanthropic donations.
- Core values
  - Partnership
  - Innovation
  - Impact
- Target audiences
  - Primarily B2B and Governmental
    1. Insurance Companies / Health Plans and MCOs
    2. Physicians and Independent Practice Associations
    3. Hospitals / Health Systems
    4. Community-Based Organizations, such as
      - Meals on Wheels
      - Area Agencies on Aging
      - Senior Centers
      - N4A
    5. Municipalities and Government Agencies
      - State, Federal and Local Health and Human Services
      - Centers for Medicare and Medicaid Services (CMS)
- Key stakeholders
  - Hospital CEOs, CMOs, Directors of Social Work, Discharge Planners
  - Physicians, medical practice staff
  - Insurance company Medical Directors, Directors of Outpatient Clinical Programs
  - Partners in Care Foundation Board Members
  - Current Partners in Care Foundation clients
- Business Challenges
  - Scaling up to meet growth needs
  - Future potential demand due to changes in Medicare Advantage Plan reimbursements and growing awareness in medical community of SDOH as a low-cost service with large benefit payoffs
- Current marketing initiatives
  - Webinars
  - Conference Presentations and Booths
  - Direct Outreach to Potential Customers

## **Our Strengths**

- Partners' strength is in organizing the individual services within a community into a single network of services. This makes it easier and more efficient for health plans, medical practices, hospitals, and others to arrange for services on behalf of patients and members.
- The agency's CEO is a nationally-recognized authority on social determinants of health, and a sought-after speaker and lecturer on these topics.
- CMS recently published a report supporting the position that Partners' SDOH interventions achieve results and save money.

## **Business Objectives**

(Measurable objectives are currently being developed along with the agency's Marketing Communications plan.)

- Maintain and enhance existing role as national leader in the Social Determinants of Health space.
- Maintain and enhance current business relationships.
- Negotiate and sign new contracts for Partners in Care.
- Negotiate and sign new contracts for Partners at Home Network.
- Negotiate and sign new contracts for Health Self-Management.
- Negotiate and sign new contracts with new HomeMeds clients.
- Develop digital and social media tools that generate leads for each Strategic Area.
- Grow number of philanthropic gifts, new donors, and grants.
- Take advantage of topics and opportunities for the CEO and Senior Staff to participate in articles, blogs, presentations, conferences or webinars that build awareness of Partners services.
- Use agency's 20th Anniversary (2019) as a platform for promoting strength, expertise, and continuity of the brand.

## **What we need.**

**See SOW at the end of this document.**

## **Tell us about your Firm**

1. Provide a brief (1-2 paragraphs) background of your organization, including the year it was founded and ownership.
2. Describe the financial stability of your organization. Include documentation depicting this stability.

3. Describe any strategic partnership with other vendors from a product, technology, and business perspective.
4. Tell us about your firm: number of clients, where clients are located, your employees, your time in business, awards, or significant recognition, and any items we should know.
5. Proof of Salesforce development training, experience and any certification.
6. How long has your business been in operation?
7. Examples of work with past or existing clients.
8. Client testimonials.
9. Results from previous projects.
10. A list of employees—and their titles—who will be working on the project.
11. What is your average employment longevity?
12. What is your project management approach and strategy?
13. How your firm charges for its services, billing practices, and any other specifics a client.
14. Describe what generally differentiates you from your key competitors.
15. Describe your implementation processes and procedures.
16. Provide a sample of the structured project implementation plan utilized.

## Proposal Evaluation

- Responses to this RFP should be returned by January 25<sup>th</sup>, 2019.
- A decision will be made by February 1st, 2019.
  
- Irma Shirvanian will be available to answer any questions during this period  
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