SELF REGIONAL HEALTHCARE

Request for Proposal
RFP #CC168
Epic Foundation Refuel and Regional Interoperability Initiative

Anticipated Schedule of Events

Milestone	Date
RFP Issued	November 13, 2026
RFP Submission Deadline	December 12, 2026
Committee Evaluation and Selection	December 16, 2026
Anticipated Notice of Award	December 23, 2026

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General Information

Self Regional Healthcare (SRH) is a nonprofit, regional healthcare system headquartered in Greenwood, South Carolina, serving approximately 300,000 residents across the Lakelands region. The system includes SRH Medical Center, Abbeville Area Medical Center, Edgefield County Healthcare, and a network of primary care, specialty care, rural health, and outpatient facilities throughout its service area.

Background Information

SRH is seeking qualified Epic implementation and healthcare technology services partners to support a comprehensive Epic modernization initiative organized into three categories: (1) Epic Foundation, (2) Epic Foundation Cyber Enhancement, and (3) Epic Foundation AI/Optimization Tools. Proposers may respond to one category, any combination of categories, or all three categories, provided each proposed category is addressed and priced separately. SRH currently operates Epic across inpatient, outpatient, specialty, revenue cycle, imaging, and ancillary service lines, but its highly customized environment creates technical debt, lengthens implementation timelines, and limits adoption of current Epic Foundation functionality, cybersecurity capabilities, predictive analytics, artificial intelligence-enabled workflows, and clinical decision-support tools.

Epic Foundation refers to Epic's standardized, preconfigured system content and recommended practices for the Epic electronic health record platform, including comprehensive application build and adoption, workflows, clinical content, decision support, reporting, interoperability, security, and operational configuration. It provides a maintainable baseline aligned with current Epic capabilities and industry practices, enabling organizations to reduce unnecessary customization, simplify upgrades and support, improve adoption, and more readily implement new Epic functionality.

The selected vendor will help modernize SRH's enterprise Epic environment, strengthen interoperability and cybersecurity, standardize workflows, reduce unnecessary customization and administrative burden, expand patient engagement and digital intake capabilities, and establish a scalable technical foundation for potential future Epic Community Connect expansion. The anticipated project is supported by South Carolina Rural Health Transformation Program Connections to Care funding, subject to final award and contracting requirements.

Federal Funding Notice: This project is supported by the Centers for Medicare & Medicaid Services (CMS) Rural Health Transformation Program (RHTP) through a subaward from the State of South Carolina. SRH was awarded $30,966,205.28 in federal RHTP funds, which represents 100% of the total project costs.

As a result, the selected vendor and any subcontractors may be subject to applicable federal requirements. Proposers should refer to the Terms, Conditions, and Federal Requirements section of this RFP for additional information.

Goals

- **Epic Foundation:** Modernize the Epic environment through Foundation Refuel, current Foundation standards, interoperability, workflow standardization, reduced customization, patient engagement, and a scalable foundation for Community Connect expansion.
- **Epic Foundation Cyber Enhancement:** Strengthen Epic-related cybersecurity, secure data exchange, ransomware readiness, identity and access controls, multi-factor authentication, remote access protections, monitoring, validation, security governance, enterprise storage resilience, and supported Windows 11 endpoints.
- **Epic Foundation AI/Optimization Tools:** Expand analytics, predictive capabilities, AI-enabled clinical decision support, automation, digital tools, and operational optimization to reduce administrative burden and improve provider, patient, clinical, and financial outcomes.

Objectives

- Complete technical debt analysis, workflow review, remediation, integrated testing, deployment, and stabilization by September 30, 2027.
- Complete the assessment, procurement, implementation, migration, validation, and operational transition of the selected VMware enterprise storage solution and Windows 11 endpoint modernization work by September 30, 2027.

Establish approved performance, capacity, availability, recovery, security, compatibility, deployment, and acceptance criteria for each infrastructure workstream before implementation.

- Achieve ten Epic Gold Stars configured and ten Gold Stars in use.
- Improve referral completion and closed-loop coordination rates by 25% from the 4.3% baseline.
- Improve targeted provider Signal measures to the Epic community median.
- Achieve five MyChart Blue Diamonds across activation, scheduling, messaging, and self-service functionality.
- Implement all five Epic Ransomware Readiness features and all six MFA Everywhere features.
- Deploy at least seven additional recommended Epic AI tools and improve utilization of existing tools to Epic median usage.
- Functionally implement Epic Cheers Campaigns and Customer Relationship Management, MyChart Bedside, and Chart with Art for Primary/Specialty Providers and Inpatient Nursing, including configuration, integration, testing, training, adoption, and transition to operational support.
- Deliver measurable improvements in inpatient throughput, operating room utilization and efficiency, and revenue cycle performance through Foundation-aligned workflow redesign, analytics, automation, and adoption.
- Implement enterprise resource planning (ERP) integrations and workflow automation directly tied to Epic Foundation functionality to support operating room optimization, improve inpatient throughput, and reduce administrative overhead.
- Improve InBasket messaging efficiency to the Epic community median or better.
- Implement digital intake Epic tools to improve patient interaction and reduce workload on operational staff.

Anticipated Contract Term

The anticipated implementation period is from contract execution expected in January 2027 through final deployment, outcome validation, and transition to operational support no later than September 30, 2027. Any ongoing support, optimization, or renewal terms proposed by the vendor must be separately identified and priced.

Scope Overview

SRH requests end-to-end professional services across three separately defined and potentially separately awarded categories.

Category 1 — Epic Foundation includes Foundation alignment, workflow redesign, application remediation, interoperability modernization, patient engagement, integrated testing, training, deployment, At-The-Elbow support, stabilization, and Community Connect readiness. ERP integration and workflow automation services are included within Category 1 only when directly tied to Epic Foundation functionality to support operating room optimization, improve inpatient throughput, and reduce administrative overhead.

Category 2 — Epic Foundation Cyber Enhancement includes Epic-related security assessment and remediation, ransomware readiness, MFA Everywhere, identity and access management, secure remote access, infrastructure hardening, monitoring, validation, security governance, enterprise storage for the VMware vSphere environment, and Windows 11 endpoint modernization and Windows 10 replacement.

Category 3 — Epic Foundation AI/Optimization Tools includes analytics, predictive and AI-enabled workflows, clinical decision support, automation, Epic Cheers Campaigns and Customer Relationship Management, MyChart Bedside, Chart with Art for Primary/Specialty Providers and Nursing, digital intake, provider efficiency, InBasket optimization, and operational improvement for inpatient throughput, operating room performance, and revenue cycle operations. Proposers must identify the categories and Category 2 subcategories included in their response and provide a distinct approach, staffing model, schedule, deliverables, assumptions, dependencies, outcomes, and pricing for each. SRH may award one category, multiple categories, all categories, or portions of a category to one or more proposers.

RFP Instructions & Protocols

Notice to Interested Parties

Proposals must be submitted as a single PDF by email to RHTP@selfregional.org by December 12, 2026 before 11:59 PM EST ("RFP Submission Deadline").

The single PDF must include the complete proposal and all required appendices and supporting documents.
The email subject line must state: "**RFP Response_RFP Title_RFP #_Proposer Organization Name**."

Response and Communication Protocols

Do not contact the requesting department. Interested proposers must email all questions and requests for additional information to RHTP@selfregional.org by December 12, 2026 before 11:59 PM. The solicitation number and title must appear in the email subject line. Attempts to circumvent this requirement may result in rejection of the proposal as noncompliant.

SRH will issue official responses to proposer questions and any amendments to this RFP in writing. Only written responses and addenda issued by SRH are binding. Proposers are responsible for reviewing and acknowledging all addenda issued before the proposal deadline. Oral statements, informal communications, or information provided by any other source may not be relied upon.

RFP Organization and Format

Responses must follow the prescribed format detailed below in order to be accepted.

Proposers should organize their proposals in the order listed below.

1. Transmittal Letter
2. Project Narrative, including a response to each Project Specification
3. Pricing
4. Appendix A: Signature Page
5. Appendix B: Deviation Form
6. Appendix C: Conflict of Interest Questionnaire
7. Appendix D: Certification Regarding Lobbying (if applicable)
8. Appendix E: Insurance Requirements

Transmittal Letter

Proposer must submit a transmittal letter that accomplishes the following:

- Proposer's name and contact information
- Brief statement of interest in the project
- Length of time the proposal and pricing will remain valid (minimum of 60 days required)
- Name, title, and signature of an authorized representative
- Brief summary of relevant qualifications and experience
- Any exceptions to the RFP requirements or terms
- Confirmation of the proposer's SAM.gov registration status, if applicable, and confirmation that the proposer and its proposed subcontractors are not subject to an applicable federal exclusion or debarment.

Project Narrative

The proposer should provide a detailed narrative describing its qualifications and proposed approach. The narrative should address each requirement included in the Project Specifications section and include the following:

1. The proposer should provide a statement explaining why it is uniquely qualified to provide the requested goods or services to SRH.

2. A summary highlighting the most important elements of this proposal.
3. Details about the proposer's overall qualifications and ability to address each specific requirement in the Project Specifications section of this RFP.
4. The qualifications, physical location, and background of the personnel who will be directly involved with this project.
5. Include a statement confirming that the proposer agrees to complete all applicable background checks and screenings, if required, before personnel begin work at SRH and/or affiliate facilities and to comply with SRH's identification, access, safety, and security requirements for on-site personnel.
6. If applicable, provide a list of current or recent clients receiving similar products or services, including each client's contact information, the size or scope of the engagement, and the length of service.
7. If applicable, disclose any current or pending litigation or regulatory matter that could affect the proposer's ability to perform the work. Disclosure will not automatically disqualify a proposer; however, failure to disclose may affect the proposer's eligibility or any resulting agreement.
8. If applicable, detailed technical information about the proposed solution and the infrastructure needed for implementation and ongoing support. This may include hardware, network, communications, third-party software, system integration, and other technical requirements.
9. Identification of all proposed subcontractors and subprocessors, including their roles, the products or services they will provide, and the portions of the work for which they will be responsible.

Optional Features, Products, and Supplemental Features

Proposers are encouraged to describe in detail any optional features, products, or services that could benefit SRH but are not included in the minimum requirements of this RFP. Optional items may include additional training, maintenance, enhanced service levels, alternative pricing options, upgrades, or other supplemental offerings. Each optional item should be clearly described and identified separately from the primary proposal. Pricing for optional items should be itemized separately and should not be included in the base proposal price.

Insurance Coverages

Proposers must maintain the insurance coverages in accordance with Appendix E.

Quality Assurance

The proposer should describe its quality assurance processes, including how it will monitor performance, identify and correct deficiencies, document quality activities, and report results to SRH. The response should identify applicable performance measures, escalation procedures, and responsibility for corrective action.

References

Provide a minimum of three (3) customer references for projects involving goods or services similar to those requested in this RFP. References should relate to comparable projects completed by the proposer, preferably for hospitals or other healthcare organizations. For each reference, include the organization's name, contact person, address, telephone number, and email address.

NOTE: SRH will not accept references submitted after the proposal deadline or by a method other than the one identified in this RFP. SRH may contact the references to confirm or clarify the information provided and may consider those responses when evaluating proposals. SRH is not required to seek clarification of incomplete reference information.

Proposal Pricing

Pricing should be itemized for all products and services requested in this RFP. Brief notes may be included when needed to explain a specific line item. The proposer should include all costs associated with its proposal and clearly identify any assumptions, exclusions, optional costs, or additional fees. SRH may select and award the products or services that best meet its needs.

Payment and Discounts

The proposer should include a proposed payment schedule that aligns with the pricing provided and the anticipated agreement. The proposer should also describe any available discounts, including early-payment discounts and the terms under which each discount would apply.

Evaluation and Review Process

Review Process

This RFP is not intended to favor any proposer and is designed to identify the proposal that provides the best overall value to SRH. The Evaluation Committee will review and evaluate the proposals, or individual portions of the proposals. Following the initial evaluation, SRH may identify a short list of proposers for further consideration. SRH may conduct discussions or interviews with those proposers and may negotiate final pricing, schedules, and other terms before making a final selection. Any final selection will be subject to SRH's applicable review and approval process.

SRH may reject any proposal that is late, materially incomplete, nonresponsive, or not submitted in accordance with the requirements of this RFP.

Evaluation Methodology

Each RFP response will be evaluated and scored using the criteria below. Each category will be scored from 0 to 5. Scores will support SRH's determination of the proposal that provides the best overall value, subject to any discussions, interviews, negotiations, and required reviews or approvals.

Evaluation Criteria

Scoring Category	Description	Maximum Points Available
Relevant Experience & References	Demonstrated experience with similar projects, qualifications, past performance, and references.	5
Technical Approach	Understanding of requirements, quality of proposed solution, methodology, and innovation.	5
Project Timeline & Work Plan	Realism and feasibility of implementation schedule, milestones, and project management approach.	5
Organizational Capacity	Availability of staffing, resources, infrastructure, and ability to successfully complete the project.	5
Cost/Price	Cost reasonableness, value for money, and alignment with proposed scope of work.	5
	Total Points Available	**25**

When determining how many points to give each scoring category, the following rating scale can be used:

Rating Scale

Rating	Descriptor	Guidance
5	Exceptional	Addresses the scoring category exceptionally well, with clear and convincing information, substantial strengths, and no significant weaknesses.
4	Very Good	Addresses the scoring category well, with sufficient supporting information, clear strengths, and only minor weaknesses.
3	Acceptable	Adequately addresses the scoring category and provides sufficient information for evaluation. Any weaknesses are manageable.
2	Marginal	Partially addresses the scoring category but includes significant weaknesses, gaps, or unclear information.
1	Poor	Minimally addresses the scoring category and includes major weaknesses, substantial gaps, or insufficient supporting information.
0	Unacceptable / Unresponsive	Does not address the scoring category or provides information that is insufficient or unacceptable for evaluation.

Project Specifications

Your proposal must specifically address, in narrative form, each requirement specified herein. You must confirm and describe your ability and intention to meet each requirement. Failure to address a specified requirement can result in disqualification of your proposal.

The proposed solution must address the project requirements below and clearly identify any exception, third-party dependency, or item that is not currently available and remains on a future product or service roadmap. Responses must describe the technical approach, implementation responsibilities, staffing, schedule, risks, pricing, reporting, security, privacy, responsible AI controls, training, support, service levels, and transition assistance.

Project Requirements

- **Category 1 — Epic Foundation**
  - Provide executive program leadership, project management, application leadership for Foundation, clinical, operational, technical, interoperability, testing, training, and deployment workstreams.
  - Conduct a comprehensive Epic Foundation workflow analysis, technical debt and customization inventory, and readiness evaluation across inpatient, outpatient, specialty, revenue cycle, imaging, ancillary, telehealth, and partner environments.
  - Develop and execute a Foundation Refuel roadmap that prioritizes Foundation alignment, remediation of legacy customization, standardized workflows, safe deployment, measurable adoption, and achievement of Gold Stars and Blue Diamonds targets.
  - Modernize interoperability, including interface optimization, referral workflow redesign, transitions-of-care communication, external clinical information integration, and standardized secure exchange with regional partners.
  - Optimize patient-facing Foundation capabilities, including MyChart, electronic intake, self-registration, self-scheduling, messaging, and related digital workflows.
  - Provide workflow redesign, training coordination, integrated testing, cutover planning, command-center support, At-The-Elbow support, issue resolution, stabilization, documentation, knowledge transfer, and transition to operational support.
  - Design, configure, integrate, test, and deploy enterprise resource planning (ERP) capabilities directly tied to Epic Foundation functionality to optimize operating room scheduling and resource coordination, improve inpatient throughput through aligned staffing and resource workflows, and reduce administrative overhead through automation of financial, supply chain, and human capital processes supporting these workflows. Proposers must identify the specific Epic Foundation functionality enabled, associated ERP integrations and dependencies, implementation deliverables, training and support transition, and measurable outcomes for operating room performance, inpatient throughput, and administrative workload reduction. ERP services must directly enable these Epic Foundation outcomes rather than constitute a standalone ERP assessment or enterprise-wide replacement initiative.
- **Category 2 — Epic Foundation Cyber Enhancement**
  - **2.1 — Cybersecurity, Identity, Governance, and Epic Readiness Controls**
    - Implement, validate, and document all five Epic Ransomware Readiness features and all six MFA Everywhere features, including testing, remediation, adoption, evidence, and transition to ongoing support.
    - Design and implement infrastructure hardening, expanded multi-factor authentication, secure remote access protections, monitoring enhancements, validation activities, security governance improvements, and cybersecurity best practices aligned with healthcare industry standards.
    - Implement Privileged Access Management (PAM) and Enterprise Password Management capabilities to secure privileged credentials, administrative accounts, service accounts, application accounts, vendor access, and workforce passwords. Capabilities should include credential vaulting, password rotation, privileged session monitoring, least-privilege administration, just-in-time access, audit logging, governance controls, and integration with Microsoft Active Directory, Microsoft Entra ID, Epic, and other enterprise systems.
    - Implement identity verification capabilities that securely validate employees, contractors,

physicians, vendors, and authorized workforce members prior to password resets, MFA enrollment or reset requests, account unlocks, and other account recovery activities. Solutions should reduce risks associated with social engineering, credential theft, account takeover, impersonation attacks, and unauthorized access.

- Provide identity protection, backup, recovery, and cyber-resilience capabilities for Microsoft Active Directory and Microsoft Entra ID environments. Solutions should support hybrid identity architectures, automated recovery orchestration, ransomware recovery, disaster recovery, recovery validation, recovery testing, immutable recovery points, and measurable recovery objectives that strengthen business continuity and operational resilience.
- Provide endpoint security, endpoint protection, and Endpoint Detection and Response (EDR) capabilities designed to improve ransomware protection, threat detection, threat hunting, incident response, forensic investigation, and automated containment of malicious activity across servers, workstations, virtual systems, cloud-hosted workloads, and remote endpoints.
- Provide Artificial Intelligence (AI) Security and Governance capabilities that enable discovery, inventory, monitoring, compliance management, risk assessment, and governance of approved and unapproved AI technologies. Solutions should support AI risk management, policy enforcement, sensitive data protection, audit reporting, compliance monitoring, AI usage visibility, and organizational AI governance.

- **2.2 — Enterprise Storage and Ransomware Resilience**
  - Provide an enterprise storage solution for the VMware vSphere environment that may replace or expand existing storage; supports current needs and future capacity and performance growth; delivers reliable, high-performance VMware storage while reducing operational and support costs; integrates with VMware, APIs, automation, and common management tools; and strengthens data protection, disaster recovery, and ransomware resilience. The proposal must include the solution overview and architecture, raw and usable capacity, performance specifications, VMware integration capabilities, data protection and disaster recovery features, implementation and migration approach, training and support offerings, customer references, and itemized pricing for hardware, software and licensing, implementation services, and support and maintenance.
- **2.3 — Windows 11 Endpoint Modernization and Windows 10 Replacement**
  - Assess, plan, and execute the replacement or upgrade of devices operating unsupported Windows 10 to a supported Windows 11 platform. The proposal must address endpoint inventory and readiness assessment, hardware and application compatibility, replacement and upgrade recommendations, security and configuration standards, data and profile migration, deployment approach, testing, user communication and training, operational support, asset disposition, implementation schedule, risks and dependencies, licensing, and itemized pricing for hardware, software, services, and ongoing support.
  - **Desktop Specifications**

    Computer refresh quantity: 612 desktops.

    The proposed desktop solution should meet or exceed the following specifications:

    - Tiny form factor chassis
    - AMD Ryzen 5 Pro 8500GE processor, up to 5.0 GHz, or equivalent
    - 32 GB RAM
    - 256 GB SSD
    - AMD Radeon 740M integrated graphics
    - Windows 11 Pro
    - TCG Opal Encryption support
    - Gigabit Ethernet
    - Wi-Fi 6 (IEEE 802.11ax)
    - Black chassis
  - **Laptop Specifications**

    Computer refresh quantity: 138 laptops.

The proposed laptop solution should meet or exceed the following specifications:

- AMD Ryzen 5 PRO 215 processor or equivalent
- AMD DASH manageability support
- 16 GB RAM minimum
- Integrated graphics
- Solid-state drive
- Windows 11 Pro
- Integrated webcam and microphone
- Wi-Fi 6 or newer
- USB-C docking capability
- TPM 2.0 and enterprise security features

- **Category 3 — Epic Foundation AI/Optimization Tools**
  - Expand analytics, predictive modeling, reporting infrastructure, Epic AI-enabled workflows, clinical decision-support capabilities, automation, and adoption measurement.
  - Deploy at least seven additional recommended Epic AI tools and improve utilization of existing tools to Epic community median usage or better.
  - Functionally implement Epic Cheers Campaigns and Customer Relationship Management, MyChart Bedside, and Chart with Art for Primary/Specialty Providers and Nursing, including assessment, Foundation-aligned design, configuration, integration, content and workflow development, testing, training, deployment, adoption, optimization, documentation, and support transition.
  - Define and execute optimization workstreams for inpatient throughput, operating room performance, revenue cycle operations, provider Signal measures, InBasket efficiency, referral completion, digital intake, and patient self-service.
  - Establish baselines and targets; configure enabling Epic functionality; implement dashboards and analytics; support operational adoption; and demonstrate measurable improvement in agreed outcomes.

For each Category 2 subcategory proposed, the vendor must provide a requirements compliance matrix that identifies whether each requirement is fully met, partially met, available through a third party, requires customization, or is not available. The matrix must reference the corresponding proposal section and identify assumptions, dependencies, exceptions, proposed alternatives, responsible parties, deliverables, acceptance criteria, implementation timing, and separately itemize.

Ownership and Use

Equipment and assets: Proposers must identify ownership and transfer terms for enterprise storage, desktops, laptops, and other assets supplied under each awarded category. Equipment purchased by SRH must become SRH property under the resulting agreement, subject to applicable funding requirements. Identify any leased, loaned, subscription-based, or vendor-owned equipment and its return, replacement, and disposition terms.

Project deliverables: Proposers must describe SRH's ownership and continuing use rights for project-specific assessments, workflow designs, configurations, integrations, scripts, reports, dashboards, training materials, test records, and operational documentation. Identify all pre-existing vendor materials and third-party intellectual property incorporated into deliverables, together with any restrictions or licenses needed for SRH and its authorized support providers to use, maintain, and modify the delivered solution. Final ownership and intellectual-property terms will be established in the resulting agreement.

Software and licensing: Identify all Epic, Microsoft, VMware, cybersecurity, AI, and other third-party licenses or subscriptions required for the proposed scope, distinguishing existing SRH entitlements from new purchases. State license ownership, authorized users and environments, duration, renewal and support charges, transfer restrictions, and rights following expiration or termination. Do not represent third-party intellectual property as transferable to SRH unless the applicable license permits it.

Data ownership and permitted use: SRH retains ownership of its data. Vendor and subcontractor access and use must be limited to performance of the awarded services and purposes expressly authorized by SRH in writing, subject to the resulting agreement and applicable privacy and security requirements. Proposers must disclose proposed hosting, subprocessors, data transfers, and any secondary use of SRH data. Use of SRH data to train AI models, develop commercial products, or support

marketing or other unrelated purposes requires SRH's prior written authorization.

Maintenance and asset records: Identify responsibilities and separately priced terms for warranties, maintenance, updates, security patches, replacement, and ongoing support. Provide applicable asset inventories, serial numbers, license and entitlement records, warranty information, configuration records, and operational documentation needed for SRH to support the implemented solution.

Transition, return, and disposition: Describe how SRH data, configurations, documentation, and applicable administrative access will be securely transferred to SRH or its designated successor at completion, expiration, or termination. Identify export formats, transition assistance, associated costs, and any limitations. Return or securely destroy retained SRH data as required by the resulting agreement, subject to applicable retention obligations, and document completion. Retirement, transfer, return, or disposal of replaced equipment must follow SRH-approved procedures, including secure data sanitization and applicable grant requirements.

Operational Experience

Proposers must demonstrate successful delivery of services comparable to each category and subcategory proposed. **Category 1** experience should include Epic Foundation Refuel or Foundation conversion, workflow standardization, interoperability, digital patient engagement, testing, deployment, and go-live support.

Category 2.1 experience should include Epic-focused cybersecurity, ransomware readiness, MFA, identity and access controls, hardening, monitoring, validation, and healthcare security governance.

Category 2.2 experience should include enterprise storage architecture, VMware vSphere integration, migration, data protection, disaster recovery, ransomware resilience, performance validation, and transition to operational support.

Category 2.3 experience should include enterprise Windows 11 readiness, hardware deployment, application compatibility, endpoint security, user and data migration, asset disposition, and large-scale healthcare endpoint modernization.

Category 3 experience should include Epic analytics, AI, predictive tools, clinical decision support, automation, digital tools, and measurable clinical, operational, provider, patient, or financial optimization. The response must identify the proposed team structure by category and subcategory, named key personnel, relevant certifications and experience, allocation, location, subcontractors, continuity approach, quality controls, escalation model, and ability to collaborate with SRH teams.

Preference may be given to firms with experience supporting regional health systems, rural hospitals, Critical Access Hospitals, and multi-entity Epic environments.

Billing and Pricing

Proposers must submit a detailed, itemized, not-to-exceed pricing schedule organized into three independent category schedules: **Category 1 — Epic Foundation**; **Category 2 — Epic Foundation Cyber Enhancement**; and **Category 3 — Epic Foundation AI/Optimization Tools**. Category 2 pricing must be further separated into **2.1 — Cybersecurity, Identity, Governance, and Epic Readiness Controls**; **2.2 — Enterprise Storage and Ransomware Resilience**; and **2.3 — Windows 11 Endpoint Modernization and Windows 10 Replacement**.

Each applicable schedule must identify labor, travel, hardware, tools, licenses, third-party costs, expenses, project management, testing, training, deployment support, optional services, ongoing support, warranties, maintenance, proposed rates by role, estimated hours or FTEs, unit prices, quantities, milestone payments, assumptions, exclusions, rate protections, travel policy, invoice detail, payment terms, and discounts.

Shared costs must be allocated transparently across categories and subcategories, and a combined price may be provided as an additional option. Proposers must allocate implementation, At-The-Elbow, and go-live support costs to the applicable categories without double counting. SRH makes no commitment to award the full amount or every category or subcategory.

Project Management and Documentation

For each proposed category and **Category 2** subcategory, proposers must describe their approach to project governance, planning, monitoring, reporting, documentation, and operational transition. The selected vendor or vendors must maintain an integrated project plan and consolidated executive dashboard, with separate reporting for each awarded workstream. Plans

and deliverables must support final deployment, outcome validation, stabilization, and transition to operational support no later than September 30, 2027. The following requirements apply to the awarded scope:

- **Project charter:** Document the awarded scope, objectives, deliverables, assumptions, exclusions, dependencies, responsible parties, and acceptance criteria for each category and subcategory.
- **Governance and accountability:** Identify vendor and SRH project leadership, workstream owners, subcontractor responsibilities, decision authority, communication practices, and escalation procedures. Describe coordination across awarded vendors and SRH clinical, operational, revenue cycle, security, infrastructure, and IT teams.
- **Detailed work plan:** Maintain category-specific plans covering mobilization, assessment, design, remediation or build, applicable procurement and migration, integration, testing, training, deployment, stabilization, outcome validation, and support transition. Align activities with the anticipated January 1, 2027 start and September 30, 2027 completion deadline.
- **Schedule, resources, and dependencies:** Identify milestones, deliverable dates, staffing allocations, responsible parties, critical dependencies, sequencing, and decision points. When multiple categories are awarded, maintain an integrated master schedule showing shared resources and cross-category coordination. Report schedule variances and corrective actions while maintaining safe, uninterrupted healthcare operations.
- **Risk, issue, decision, and change management:** Maintain logs of risks, issues, dependencies, decisions, owners, mitigation actions, escalation status, and resolution dates. Document proposed scope, schedule, resource, configuration, and cost changes and their effects on deliverables, security, acceptance criteria, and outcomes through project change control.
- **Workflow and technical documentation:** Deliver assessment findings, technical debt and customization inventories, Foundation alignment and remediation records, workflow designs, configuration and build documentation, architecture and integration specifications, migration plans, and operational procedures applicable to the awarded scope. Document ERP integrations only where directly tied to the Epic Foundation outcomes defined in this RFP.
- **Security, resilience, and compliance evidence:** Document applicable security assessments, remediation, ransomware readiness, MFA Everywhere, identity and access controls, endpoint protection, AI security and governance, and backup and recovery validation. Maintain Category 2 requirements compliance matrices and evidence of approved storage performance, capacity, availability, recovery, endpoint compatibility, security configuration, migration, and acceptance criteria. Documentation must support applicable privacy, security, records-retention, and grant requirements identified in this RFP and the resulting agreement.
- **Testing and acceptance:** Maintain test plans, scenarios, results, defect logs, remediation and retest evidence, and deliverable acceptance records. Address integrated workflows, interfaces, security controls, migration, storage performance and recovery, Windows 11 hardware and application compatibility, and AI or optimization workflows as applicable.
- **Training and knowledge transfer:** Provide training plans, materials, completion records, user communications, adoption documentation, and knowledge-transfer records. Identify operational support responsibilities and provide procedures needed for SRH to maintain implemented workflows, controls, infrastructure, and tools.
- **Deployment readiness and stabilization:** Document readiness assessments, cutover and migration plans, continuity and recovery procedures, go-live decisions, command-center and At-The-Elbow support arrangements, issue resolution, stabilization, and transition to ongoing support for each applicable workstream.
- **Status and executive reporting:** Provide routine status reports and a consolidated executive dashboard at a cadence agreed with SRH. Report milestones, deliverables, staffing, budgets, forecasts, risks, issues, dependencies, decisions, changes, testing, training, readiness, and stabilization separately by awarded category and subcategory. Identify variances, corrective actions, accountable owners, and decisions required from SRH. Allocate shared costs transparently without double counting.
- **Performance and outcome measurement:** Establish baselines, applicable RFP targets, measurement methods, data sources, accountable owners, and validation evidence. Category 1 reporting must address Foundation progress, Gold Stars configured and in use, MyChart Blue Diamonds, referral completion and closed-loop coordination, provider Signal measures, interoperability, patient engagement, testing, training, and deployment. Category 2.1 reporting must address all five Epic Ransomware Readiness features, all six MFA Everywhere features, security remediation, control evidence, risks, and adoption. Category 2.2 reporting must address storage capacity, performance, availability, migration, backup, recovery, ransomware resilience, testing, acceptance, and operational transition.

Category 2.3 reporting must address endpoint inventory, compatibility, procurement, deployment of 612 desktops and 138 laptops, migration, security configuration, Windows 10 retirement, asset disposition, user readiness, support, and acceptance. Category 3 reporting must address additional Epic AI-tool deployment and utilization, predictive and decision-support adoption, Cheers Campaigns and Customer Relationship Management, MyChart Bedside, Chart with Art, InBasket efficiency, digital intake, inpatient throughput, operating room performance, revenue cycle outcomes, and applicable ERP-enabled improvements.

- **Final evaluation, transition, and closeout:** Deliver validated outcome results, completed deliverables and acceptance records, remaining issue and risk dispositions, operational support handoff, applicable asset and licensing records, and final project and budget reporting. Provide all documentation and data produced for SRH in accessible formats suitable for operational use, contractor oversight, records retention, audit cooperation, and grant reporting.

Implementation

For each proposed category, the proposer must provide a detailed implementation plan aligned to the anticipated January 1, 2027 through September 2027 period. Plans must show category-specific mobilization, assessment, design, remediation or build, testing, training, operational readiness, deployment, support, stabilization, knowledge transfer, acceptance criteria, and transition to ongoing support.

When proposing multiple categories, the proposer must also provide an integrated master schedule showing shared resources, dependencies, sequencing, decision points, risks, and coordination across Epic Foundation, Epic Foundation Cyber Enhancement, and Epic Foundation AI/Optimization Tools while maintaining safe, uninterrupted healthcare operations.

Terms, Conditions, and Federal Requirements

General Solicitation Conditions

- SRH may reject any or all proposals, cancel or amend the solicitation, waive minor informalities, request clarifications, negotiate, or make no award.
- All proposal preparation costs are the vendor's responsibility.
- A proposal is an offer and may be incorporated into the final contract. The executed contract and incorporated amendments will control in the event of conflict.
- Vendors must protect confidential information and clearly identify claimed proprietary information.
- SRH is not bound by oral statements or vendor assumptions not accepted in writing.
- The vendor must maintain insurance, licenses, staffing, and controls appropriate to the work and required by the final agreement.
- No work may begin before a fully executed agreement and required purchase authorization.

Federal Award Compliance

This procurement is supported by federal award or subaward funds. Before the final contract is executed, SRH Legal, Grants, and Procurement will review the contract type, total value, funding source, scope of work, award and pass-through terms, and applicable provisions of 2 CFR Part 200 to determine which federal clauses and related federal, state, and SRH requirements must be incorporated. The selected vendor must comply with all requirements identified through that review and included in the final contract.

- Documented competition and procurement integrity.
- Conflict-of-interest and organizational conflict disclosures.
- Contractor oversight, records access, retention, audit cooperation, and performance documentation.
- Cost and price analysis and disclosure necessary to establish reasonableness.
- Applicable affirmative steps supporting small, minority, women-owned, veteran-owned, and labor surplus area firms.
- Applicable domestic preference, recovered-material, debarment, telecommunications, lobbying, equal opportunity, labor, clean air and water, inventions, and termination provisions.
- Applicable contract provisions identified in 2 CFR 200.327 and Appendix II to Part 200.

- Maintenance of records supporting invoices, performance, deliverables, equipment, and grant reporting.

Flow-Downs and Contract Provisions

The selected vendor must flow down applicable federal, privacy, security, data-use, and award requirements to its subcontractors, subprocessors, and suppliers. The final contract is expected to include provisions addressing remedies, termination, applicable laws, records access, audit, privacy, security, incident notification, data ownership and permitted use, data return and destruction, AI governance when applicable, indemnification, insurance, intellectual property, warranties, service levels, deliverable acceptance, transition assistance, and applicable federal award clauses. Any exception must be identified in the Deviation Form with proposed alternative language.

Appendix A

RFP #CC168 | EPIC Foundation Refuel

The proposer must meet the specifications of this RFP.

*****THIS SIGNATURE PAGE MUST BE INCLUDED IN THE PROPOSAL IN THE ORDER SPECIFIED IN THE RFP ORGANIZATION AND FORMAT SECTION*****

Do not include sales tax in the proposal because SRH is tax-exempt. SRH will provide applicable tax-exemption documentation upon request. Submit the proposal and all required supporting documents as a single PDF by email to RHTP@selfregional.org.

Proposers should identify any applicable business classification(s) in the field provided below, including small business, minority-owned, women-owned, veteran-owned, or other. If applicable, include the certifying organization or certification number. If no classification applies, enter "None."

Business Classification	**Certifying Organization or Certification Number**

By signing this proposal, the proposer represents and warrants that it has read and understands this RFP and its terms and conditions; agrees to provide the equipment, supplies, or services described below at the stated prices and in accordance with the specifications listed below or attached; and confirms that all prices and quotations will remain valid for **60 days** from the proposal submission deadline.

Company/Contractor	**Mailing Address**
Federal Tax Identification Number	**City, State, Zip Code**
Unique Entity Identifier	**Fax Number (include area code)**
Email Address	**Telephone Number (include area code)**
Authorized Representative Name & Title	**Date**
Authorized Representative Signature	

Appendix B

DEVIATION FORM

All deviations from this Solicitation must be noted on this form. If no entry is made on the Deviation Form, the proposer confirms its full agreement with and compliance with the Specifications, Terms, and Conditions.

Each response to this Solicitation must include a Deviation Form stating the prospective vendor's commitment to the provisions of this Solicitation. An individual authorized to execute contracts must sign the form. Any exception to the terms and conditions identified in this Solicitation Package must be expressly stated on the Deviation Form.

THIS DEVIATION FORM MUST BE SIGNED BY EACH PROPOSER WHETHER THERE ARE DEVIATIONS LISTED OR NOT, AND SUBMITTED WITH THIS SOLICITATION

SPEC # / Section # / Page #	Deviation(s)

_____ _____ _____

Authorized Representative Name & Title **Authorized Representative Signature** **Date**

Appendix C

CONFLICT OF INTEREST QUESTIONNAIRE

Each proposer must complete and sign this form. Disclose any actual, potential, or perceived conflict involving the proposer, its personnel, or SRH. If none exists, select "No conflict."

Proposer Legal Name	
Project / Solicitation	
Primary Contact	
Email / Telephone	

Select one:

☐ No conflict exists.

☐ A conflict or relevant relationship is disclosed below.

Individuals / Organizations Involved	
Nature of Conflict or Relationship	
Proposed Mitigation	

Certification: I certify that the information provided is complete and accurate and that the proposer will promptly disclose any change during the solicitation or contract term.

_____ _____

Authorized Representative Name & Title **Authorized Representative Signature**

_____ _____

Date **Email / Telephone**

Appendix D

CERTIFICATION REGARDING LOBBYING

Submit only if the bid or offer exceeds $100,000 and federal funds are involved.

Proposer Legal Name	
Project / Solicitation	
Grant Program, if applicable	
Solicitation / Contract Number	

Certification: The undersigned certifies, to the best of their knowledge and belief, that no federally appropriated funds have been or will be used to influence federal officials or members or employees of Congress in connection with a federal contract, grant, loan, or cooperative agreement. This certification must be included in applicable lower-tier awards, and all subrecipients must certify and disclose accordingly.

This certification is a material representation of fact and a prerequisite under 31 U.S.C. § 1352. Failure to file the required certification may result in applicable civil penalties.

Authorized Certification: The undersigned certifies that the information provided is true and accurate and is authorized to execute this certification on behalf of the proposer.

_____ _____

Authorized Representative Name & Title **Authorized Representative Signature**

_____ _____

Date **Email / Telephone**

Appendix E

INSURANCE REQUIREMENTS

The selected vendor must maintain insurance appropriate to the work throughout the contract term. Coverage must be issued by insurers authorized to do business in South Carolina and acceptable to SRH.

Coverage	Minimum Requirement
Commercial General Liability, including product liability	$3,000,000 per occurrence / $5,000,000 aggregate
Medical Malpractice Professional Liability Insurance	$3,000,000 per occurrence / $5,000,000 aggregate, if applicable
Cyber / Privacy Liability	$5,000,000 per occurrence / $5,000,000 aggregate
Automobile Liability	No less than $1,000,000 per accident for bodily injury and property damage, including coverage for hired/non-owned auto exposures.
Workers' Compensation	Statutory limits and employers' liability required by law

Evidence of Coverage: Before work begins, the selected vendor must provide certificates of insurance demonstrating compliance with Appendix E and any additional insurance requirements included in the final agreement. Updated certificates must be provided upon renewal and upon SRH's request. SRH and its applicable affiliates must be named as additional insureds on liability coverage where appropriate. Coverage must be primary and noncontributory, include waiver of subrogation where permitted, and provide advance notice of cancellation or material change to the extent available under the policy.

SRH may require additional coverage or revised limits based on the nature and risk of the final scope of work. The proposer must identify any requested exception to the insurance requirements in Appendix B: Deviation Form when submitting its proposal.