Selecting the right software for your perioperative services department is one of the most important decisions a manager makes. The software used to manage perioperative services is critical because the OR drives the hospital’s inpatient capacity as well as the revenue and margin. The software must enable the OR manager to access data needed to guide strategic decisions, surgical scheduling, and quality.

Finding the best vendor to fit your organization can be a challenge. Among questions that must be answered are:

• Will you need a “niche” solution only for the OR? Or will your software need to integrate into a facilitywide system?
• Will you need new hardware to accommodate the application?
• Are upgrades necessary and supported?
• What are the interface requirements? How successful are the various vendors at implementing interfaces?
• Will you be able to retrieve reports you need?

The best way to start is to send vendors you will consider a request for proposal (RFP). An organized, well-thought-out RFP not only provides vendors with your specific requirements but also establishes clear communication between your organization and vendors. It allows you to define your hospital’s mission and needs and to obtain information about how each vendor will meet and support those needs. These are steps to consider in developing your RFP. (A sample outline is in the sidebar.)

**Identify the scope of the project**

The decision about a niche system versus an integrated solution should be made first. All vendors are not equal—integrated systems (designed to provide enterprisewide solutions) are different from niche systems intended for a specific service area. While enterprisewide solutions may not have all of the specialty-specific features a niche solution may have, they provide greater access to information across the continuum, decreasing the need for interfaces. Each interface that needs to be developed for a niche system raises issues of compatibility and errors.

The choice between an enterprisewide or service-specific product must be made before taking the next step of identifying potential vendors.

**Identify prospective vendors**

Once you have determined the scope of the project, you’re ready to identify prospective vendors. National conferences, site visits to observe vendors’ systems in a live environment, and vendor demonstrations are good ways to identify prospective vendors.

A letter of introduction should be sent to prospective vendors to request information about their company—they may or may not be able to meet your needs. The letter should request information about the company’s growth, capacity, and viability—is the software well established, or is it “vapor ware”? Your organization will need to decide if it wants to consider software that is in alpha or beta testing.

After the vendors have been identified and background checks performed, develop a list of vendors to whom you will send the RFP.
The vendors probably will have questions once the RFP has been received. Appoint a single contact in the organization to ensure suppliers are given consistent information. It is important that deadlines are met and communication occurs in writing in the way specified in the RFP overview.

**Receipt of proposals**

Once the proposals are received, weed out those that do not meet the organization’s needs. Narrow the field to those best able to address the needs of your organization and evaluate their proposals. Check references and arrange site visits to assure that the proposal is accurate, and the company is able to provide what its proposal promises. It may be beneficial to visit the vendor’s headquarters as well. Expenses for site visits may be paid by the vendor or hospital. Who will cover the expense should have been addressed in the RFP so there are no surprises.

After the proposals have been evaluated, the organization may need to reassess and discuss or negotiate some components with the vendors. After completing these steps, the organization should have a sense of the 2 to 3 possible vendors.

**The final offer**

The vendors should then provide their best and final offer. The organization must decide which vendor will best meet its needs. The organization’s senior leadership should be briefed on the finalists and the budgetary requirements clearly delineated.

After the purchase has been made, the vendors who were not chosen should be contacted with the decision. It is a courtesy to allow them to question the decision so they can improve future proposals based on your feedback. All documentation between the chosen vendor and your organization should be maintained for the contract period.

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**Resources**

Custom Software RFP sample.


**Sample structure for a request for proposal**

An outline for an RFP for a perioperative information system.

I. **Overview**

This section provides the vendor with the invitation to submit a proposal to your organization and describes the way the proposals will be managed. It usually outlines the purpose for the request or a statement of the issues. In addition, this section provides the deadlines for the proposal as well as the parties to whom the proposal should be addressed. This section may also include general information about your organization and the departments that may be involved in the decision and/or implementation. It may also include background information on work processes that may affect the implementation. This section should clearly state how the RFP should be submitted and for how long the proposal should be valid.
II. Technical requirements

The technical section is perhaps the most important. This section describes the technical details and the work required to meet the needs the product is expected to address. That may include hardware, interfaces, compatibility, ease of use, reporting capability, etc.

Your organization’s requirements for each of these items must be clearly defined so the vendor’s proposal will be specific in addressing each requirement. The IT department must be involved with this portion of the RFP because this is generally within their purview. The IT department must rely on the clinical, financial, and operational issues associated with the product and write the technical requirements according to the needs and capabilities of the organization. Specific requirements about upgrades, future growth, and changes in technology should also be addressed. In addition, requirements for staff education and training must be clearly described.

III. Vendor qualifications

In this section, the vendor is asked to submit information about the company:

• How long has the company been in business?
• Has the company demonstrated stability and positive fiscal performance in the previous 5 years?
• What support does the company provide for its product?
• What is the expected timeframe for resolution of issues and response for on-site work?
• How will conflicts or issues be addressed and resolved during implementation and for the length of the contract?

The company is asked to provide a list of clients and actual project implementations.

IV. Pricing and implementation

The pricing section should address all of the requirements outlined in the RFP. For budgeting purposes, the organization must specify a clear and consistent format for submitting pricing information. If proposals are similar, pricing may be the deciding factor. The requirements listed in Technical Requirements section must be linked to pricing. Hardware requirements for servers, routers, computer workstations, interface engines, printers, and other ancillary devices must be priced. The software applications; licenses and user fees, and any operational costs such as redundant systems, downtime, work-arounds, or customization costs should also be listed here.

Vendors should be instructed to define pricing clearly for the quantities for each line item. For example, is the license for the organization as a whole, or will each department be required to have a license? Implementation costs, travel for consultants and implementation specialists, and testing and integration of the software with existing systems should also be priced. Ensuring that each component is priced separately will reveal any hidden costs that may be buried in a more global pricing structure. One approach is to include a spreadsheet with the RFP listing each required component and request that all vendors use the spreadsheet for their submissions. Especially important to capture are any maintenance or annual fees that will continue for the useful life of the product.

It is acceptable to state that pricing must be competitive and, in fact, better than other offers if your organization commands a higher market share or buying power than other organizations of similar size.

In addition, your organization may offer vendors a sole-source or longer-term contract in the RFP. You should clearly define acceptable and unacceptable pricing structures. For example, if your organization will not accept pricing based simply on a percentage discount off list price, the RFP should state that no such proposal will be considered.

V. Contracting section

This section describes any contracts or agreements the vendor must enter into or
disclose for the organization. A Health Insurance Portability and Accountability Act (HIPAA) agreement is an example. If the software will allow access at any time to protected health information, your organization’s legal counsel may require the vendor to sign a binding agreement that will protect that information. Purchase agreements as well as any maintenance contracts, warranties, and so forth should be included in this section.