

ACCESS VT

REQUEST FOR PROPOSAL

Shared-Services Options, Cost Analysis, and Feasibility Study

Issued by	ACCESS VT
RFP issue date	October 21, 2026
Questions due	Friday, November 6, 2026
Proposal deadline	Monday, November 23, 2026, 9am
Anticipated award	Monday, December 7, 2026
Anticipated project period	Up to 10 months; final schedule established during contracting

1. Purpose

ACCESS VT seeks a consultant to work collaboratively with the ACCESS VT project team and participating Vermont Care Partners (VCP) Network agencies to identify and narrow a broad set of shared-service ideas to a small number of priority options. The consultant will then complete focused cost analysis and feasibility studies for the options selected by the project team.

The intent is to support informed decisions about which shared-service opportunities are practical, financially viable, and worth advancing. This is not a request for the consultant to design every aspect of a network-wide shared-services organization or to independently select the final priorities.

2. Background

The VCP Network includes 16 Designated Agencies and Specialized Service Agencies providing community-based mental health, substance use, and intellectual and developmental disability services and supports across Vermont. ACCESS VT is advancing a one-year planning initiative to strengthen shared infrastructure, reduce duplication, maximize limited resources, and support long-term network sustainability.

Potential options may include shared technology or data, workforce development and training, administrative functions (HR, centralized billing, communications, centralized insurance, etc.), clinical and service capacity (clinical leadership, trained respite providers, etc.), specialized access supports (benefits navigation, rep payee services, ASL/interpreter), or other functions identified by the project team. Not every agency will need to participate in every shared service.

3. Project Objectives

- Help the project team organize and compare potential shared-service options.
- Facilitate a practical process to narrow the options to a small number for deeper study.
- Assess the cost, benefits, risks, readiness, and operational feasibility of the selected options.
- Provide clear findings and recommendations that the project team can use to decide what to pursue and what steps should come next.

4. Scope of Work

Task 1. Project Launch and Focused Review

- Meet with the ACCESS VT project team to confirm goals, roles, schedule, decision points, and available budget.
- Review relevant existing materials, prior discussions, surveys, and available financial or operational information.
- Identify information gaps that are material to prioritization or feasibility. Data requests should be limited to information needed for the selected analyses.

Task 2. Develop and Narrow the Options

- Work with the project team and selected agency stakeholders to develop a manageable list of potential shared-service options.
- Create a simple comparison framework using criteria agreed upon with the project team, such as need, likely benefit, cost, complexity, agency interest, readiness, risk, and time to implement.
- Facilitate discussions that help the project team select approximately two to four options for deeper analysis. The final number will depend on scope, data availability, and budget.
- Document why the selected options were advanced and why other options were deferred or screened out.

Task 3. Cost Analysis and Feasibility Study

For each selected option, complete a right-sized analysis that addresses the factors most relevant to a go/no-go decision. As applicable, the analysis should include:

- Clear definition of the proposed shared service and who could use it.
- Current-state costs or resources, when reliable information is available.
- Estimated startup, transition, and ongoing operating costs, with assumptions clearly stated.
- Potential cost-sharing approaches and participation scenarios.
- Potential savings, avoided costs, capacity gains, service improvements, or other benefits.
- Operational requirements, including staffing, technology, vendors, data, workflow, and administrative support.
- Key legal, regulatory, contractual, privacy, cybersecurity, or procurement issues that may require specialized review.
- Agency interest, readiness, minimum participation needs, and potential barriers.
- Major risks, dependencies, implementation choices, and conditions for success.
- A practical conclusion: proceed, proceed with conditions or a pilot, conduct additional study, or do not pursue at this time.

Task 4. Decision Support and Final Recommendations

- Present preliminary findings to the project team and revise the analysis based on feedback.
- Compare the selected options in a concise decision matrix.
- Recommend which option or options, if any, should move into implementation planning.
- Identify near-term next steps, responsible parties, additional expertise needed, and outstanding decisions.

5. Expected Deliverables

Deliverable	Minimum Content	Timing
1. Brief work plan	Approach, schedule, roles, meetings, data needs, and decision points.	At project launch
2. Options and prioritization summary	Potential options, agreed criteria, comparison, and selected options for deeper study.	Early project phase
3. Cost and feasibility analyses	One concise, transparent analysis for each selected option, including assumptions and recommendation.	Middle project phase

4. Final decision package and blueprint	Cross-option comparison, recommendations, next steps, and executive presentation.	Final project phase
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Financial workbooks must be provided in editable Excel format with formulas and assumptions visible. Narrative deliverables and presentations must be provided in editable Microsoft formats. Final scope and timing will be confirmed during contracting.

6. ACCESS VT Responsibilities

- Designate a project lead and project team.
- Provide relevant existing materials and available data.
- Coordinate access to participating agency representatives and existing workgroups.
- Make decisions about prioritization and the options selected for deeper analysis.
- Review draft deliverables and provide consolidated feedback.
- Lead internal governance decisions and determine whether and how to proceed with implementation.

7. Consultant Qualifications

- Experience evaluating shared services, managed services, collaborative business models, or multi-organization initiatives.
- Demonstrated skill in financial modeling, cost-benefit analysis, and operational feasibility studies.
- Experience facilitating prioritization and decision-making among independent organizations.
- Ability to produce concise, transparent, decision-ready work products.
- Experience in health care, mental health and substance use, human services, I/DD, rural systems, and nonprofit networks is preferred.

8. Proposal Requirements

Proposals should be concise and include the following:

- Understanding of the project and proposed approach.
- Work plan and schedule, including the proposed number of options that can be analyzed within the budget.
- Names, roles, qualifications, and availability of key staff.
- Two or three examples of comparable work and references.
- Fixed fee or not-to-exceed budget showing costs by phase or deliverable, rates, assumptions, travel, and optional services.
- Any requested changes, exclusions, data needs, or support required from ACCESS VT.

Suggested proposal length: no more than 12 pages, excluding resumes and work samples.

9. Evaluation and Selection

ACCESS VT expects to select the proposal that offers the best combination of relevant experience, a practical and right-sized approach, strong financial analysis, effective facilitation, availability, and cost. ACCESS VT may request an interview, clarification, or revised scope and budget before award.

10. Submission and General Conditions

- Submit proposals electronically in PDF format to sarah@vermontcarepartners.org by Monday, November 23, 2026, 9am EST.
- Use the subject line: "ACCESS VT Shared Services RFP - [RESPONDENT NAME]."
- Questions must be directed to Sarah Kleinman at sarah@vermontcarepartners.org.
- ACCESS VT may reject proposals, modify or cancel the solicitation, seek clarification, negotiate scope and price, or award all or part of the work.

- ACCESS VT will not reimburse proposal-development costs.
- The final contract will define confidentiality, data security, insurance, ownership of work products, payment, and applicable grant or legal requirements.
- Individual-level patient information is not anticipated to be required.

Appendix A. Cost Proposal Template

Phase / Deliverable	Lead Staff	Hours	Rate	Total
Project launch and review				
Options and prioritization				
Cost and feasibility analyses				
Final decision package				
Travel / other direct costs				
Optional services				
TOTAL				

Respondents may use their own budget format if it provides equivalent information and clearly identifies assumptions and optional costs.