



OGC Template 0926

REQUEST FOR PROPOSAL

by

The University of Texas Health Science Center at San Antonio

for

Selection of a Vendor to Provide

Organization Design and Workforce Planning Platform

RFP No. 745-27-P01

Submittal Deadline:

**3:00 PM – Central Prevailing Time –
Thursday – November 19, 2026**

Issued: 8:00AM – Central Prevailing Time – Thursday – October 8, 2026

DEPARTMENT OF PURCHASING | HUB PROGRAMS | Mail Code 7962 | 7703 Floyd Curl Drive | San Antonio, Texas 78229-3900
210.562.6200 | <https://uthscsa.edu> | <https://wp.uthscsa.edu/purchasing/>

REQUEST FOR PROPOSAL

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INTRODUCTION

1.1 Description of University

The University of Texas at San Antonio ([UTSA](#)) is a nationally recognized Carnegie R1 public research university and the third-largest public research university in Texas. With more than 44,000 students, 17,000 employees and \$521 million in annual research expenditures (FY26), UTSA advances excellence in education, research and discovery, health and community engagement to expand opportunity, drive innovation and make lives better.

The UT San Antonio Health Science Center ([UTHSA](#)) is the university's academic health center and one of the most comprehensive in the nation, encompassing schools of medicine, dentistry, nursing, health professions, graduate biomedical sciences and public health. Through UTHSA, the university integrates nationally leading health education, research and discovery with patient care across more than 120 specialties serving 38 counties in South Texas. Deeply rooted in San Antonio and serving South Texas and communities across the state, UT San Antonio is strengthening its position as a national powerhouse in education, research, discovery and health.

1.2 Background and Special Circumstances

UTSA has a mission to make lives better through excellence in education, research, health care and community engagement.

The Institution is undergoing a period of significant organizational transformation driven by a strategic merger between the University of Texas at San Antonio and the University (UTSA) of Texas Health Science Center at San Antonio (UTHSA) and continued growth and increasing workforce complexity. As the Institution integrates organizations, functions, people, systems, and operating models, it is also experiencing rapid growth across clinical, academic, research, administrative, and support functions. This transformation creates an opportunity to establish a more integrated, sustainable, and data-informed approach to organizational design and workforce planning.

The Institution recognizes that successful integration and growth require more than traditional position management or headcount forecasting. The organization must be able to understand its current and future organizational structures, assess workforce capacity and capabilities, identify gaps and opportunities, model alternative organizational and workforce scenarios, and align talent and resources with strategic priorities and establish consistent, transparent, and repeatable methodologies for organizational design and workforce planning and must be closely integrated with financial planning, strategic planning, budgeting, talent management, and other enterprise planning processes to ensure alignment and informed decision-making. This is especially important during a period of significant organizational change, where leaders require reliable, timely, and actionable workforce data to effectively guide decisions and achieve business objectives.

The Institution is seeking proposals from qualified firms to provide an Organizational Design and Workforce Planning Platform that can serve as an enterprise capability for understanding, designing, modeling, planning, and managing organizational and workforce requirements. The desired solution should enable the Institution to move from primarily manual, fragmented, or point-in-time workforce planning toward an integrated, scenario-based, data-driven approach.



The platform should support both merger integration and longer-term organizational and workforce planning as the Institution continues to evolve and is interested in solutions that can accommodate the complexity of a health and academic environment and provide a flexible foundation that can scale as organizational structures, workforce requirements, and strategic priorities change.

No Guarantee of Volume. UTHSA does not solicit or guarantee any specific amount of compensation, volume, minimum, or maximum amount of Services under this RFP or any contract or agreement resulting from this RFP.

1.3 Objective of Request for Proposal

The University is soliciting proposals in response to this Request for Proposal RFP 745-27-P01, from qualified proposers to provide operational guidance services (the “**Services**”) for Organization Design and Workforce Planning Platform Services are more defined in **Section 5** (Scope of Work) of this RFP.

1.4 Group Purchase Authority

Texas law authorizes institutions of higher education (defined by [§61.003, Education Code](#)) to use the group purchasing procurement method (ref. §§[51.9335](#), [73.115](#), and [74.008](#), Education Code). Additional Texas institutions of higher education may therefore elect to enter into a contract with the successful Proposer under this RFP. In particular, Proposer should note that University is part of The University of Texas System (**UT System**), which is comprised of fourteen institutions described at <http://www.utsystem.edu/institutions>. UT System institutions routinely evaluate whether a contract resulting from a procurement conducted by one of the institutions might be suitable for use by another, and if so, this RFP could give rise to additional purchase volumes. As a result, in submitting its proposal, Proposer should consider proposing a pricing model and other commercial terms that take into account the higher volumes and other expanded opportunities that could result from the eventual inclusion of other institutions in the purchase contemplated by this RFP. Any purchases made by other institutions based on this RFP will be the sole responsibility of those institutions.

1.6 Public Information

All information, documentation, and other materials submitted in response to this solicitation are considered non-confidential and/or non-proprietary and are subject to public disclosure under the Texas Public Information Act (Texas Government Code, Chapter [552.001](#), et seq.) after the solicitation is completed.

1.7 Artificial Intelligence (AI)

Awarded Proposer agrees that all data provided by UT Health San Antonio is confidential and shall be used solely for the purposes outlined in this agreement. Other than what is explicitly outlined in this agreement, the Awarded Proposer shall not use, disclose, or permit the use of UT Health San Antonio data to develop, train, or enhance any artificial intelligence or machine learning models, including Generative AI, Attention-based, or Generative Pre-Trained Transformer (GPT) technologies, without prior written consent from UT Health San Antonio. All data rights and ownership remain with UT Health San Antonio, and any unauthorized use is strictly prohibited. The Awarded Proposer must implement appropriate security measures to protect UT Health San Antonio data, including encryption, backup, and access controls, and shall destroy or return all data upon termination of this agreement.

SECTION 2

NOTICE TO PROPOSER

2.1 Submittal Deadline

University will accept proposals submitted in response to this RFP until **3:00 PM Central Prevailing Time, Thursday – November 19, 2026 via our e-Procurement Website [Euna](#) (formally Bonfire).**

2.1.1 When submitting your proposal – follow the directions in [Euna](#).

1. Each document that is required **must** be submitted individually, completed, and signed (if applicable). **DO NOT UPLOAD ALL FILES TOGETHER**

2.1.2 If during your submission, you encounter any technical issues – you must contact [Euna Support](#) directly for assistance or by calling **1-844-226-3862**

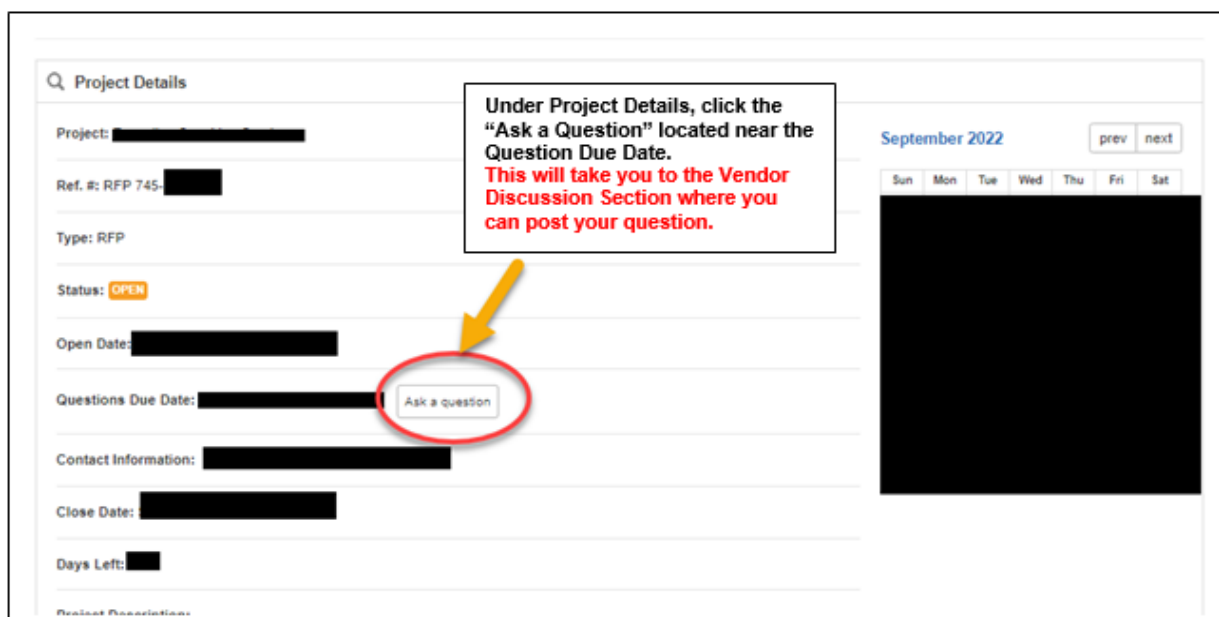
1. After contacting [Euna](#), inform the Strategic Sourcing Specialist that you have reached out to Euna due to technical issues.

2.1.3 Euna offers a Help Forum which you can access by clicking [here](#).

2.2 RFP Contact Information and Questions

2.2.1 Interested parties MUST direct questions **ALL QUESTIONS MUST GO THROUGH [Euna](#)** about this RFP through **Euna Opportunity Q&A**.

Located in the Project Details (see below).



Project Details

Project: [REDACTED]

Ref. #: RFP 745- [REDACTED]

Type: RFP

Status: **OPEN**

Open Date: [REDACTED]

Questions Due Date: [REDACTED] **Ask a question**

Contact Information: [REDACTED]

Close Date: [REDACTED]

Days Left: [REDACTED]

Under Project Details, click the "Ask a Question" located near the Question Due Date. This will take you to the Vendor Discussion Section where you can post your question.

September 2022

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Sun Mon Tue Wed Thu Fri Sat

University instructs interested parties to restrict all contact and questions regarding this RFP to written communications delivered (i) in accordance with this Section on or before **3:00 PM Central Prevailing Time, Thursday – November 5, 2026 (Question Deadline)**, or (ii) if questions relate to Historically Underutilized Businesses, in accordance with **Section 2.5**.

University will provide responses as soon as practicable following the Question Deadline. University intends to respond to all timely submitted questions. However, University reserves the right to decline to respond to any question.

If submitting multiple questions, submit them in one submission (not multiple submissions).

2.3 Criteria for Selection

The successful Proposer, if any, selected by University through this RFP will be the Proposer that submits a proposal on or before the Submittal Deadline that is the most advantageous to University. **Contractor** means the successful Proposer under this RFP.

Proposer is encouraged to propose terms and conditions offering the maximum benefit to University in terms of (1) service, (2) total overall cost, and (3) project management expertise.

The evaluation of proposals and the selection of Contractor will be based on the information provided in the proposal. University may consider additional information if University determines the information is relevant.

University reserves the right to award a Contract for all or any portion of the requirements proposed by reason of this request, award multiple Contracts, or to reject any and all proposals if deemed to be in the best interest of the University and to re-solicit for proposals.

Criteria to be considered by University in evaluating proposals and selecting Contractor, will be these factors:

2.3.1 Threshold Criteria Not Scored

- A. Ability of University to comply with laws regarding Historically Underutilized Businesses; and
- B. Ability of University to comply with laws regarding purchases from persons with disabilities.
- C. Whether Proposer has knowingly or intentionally failed to comply with *Texas Government Code, Chapter 552, Subchapter J* in a previous bid or contract and, if so, whether Proposer has taken adequate steps to ensure future compliance with the requirements of the Subchapter J (red. **Appendix One, Section 2.1.19**)

2.3.2 Scored Criteria

- A. Cost of goods and services **(20 Points)**.
- B. Reputation of the Proposer and of the Proposer's goods or services **(20 Points)**.
- C. Quality of the Proposer's goods or services **(25 Points)**.
- D. Extent to which the goods or services meet the University's needs **(20 Points)**.
- E. Proposer's past relationship with the University **(10 Points)**.
- F. Proposer's exceptions to the terms and conditions set forth in **Section 4 (5 Points)**.

2.4 Key Events Schedule

Date RFP Issued	<u>8:00 AM Central Prevailing Time, Thursday – October 8, 2026</u>
Pre-Proposal Meeting (ref. Section 2.6)	<u>10:15AM – 10:45 AM Central Prevailing Time - Thursday – October 15, 2026</u>
Question Deadline (ref. Section 2.2)	<u>3:00 PM Central Prevailing Time, Thursday - November 5, 2026</u>
Submittal Deadline (ref. Section 2.1)	<u>3:00 PM Central Prevailing Time, Thursday - November 9, 2026</u>

2.5 Veteran Heroes United in Business (VetHUB)

- 2.5.1 All agencies of the State of Texas are required to make a good faith effort to assist service-disabled veteran-owned (SDV) businesses in receiving contract awards. The goal of the VetHUB Program is to promote full and equal business opportunity for all businesses in contracting with state agencies. Pursuant to the VetHUB Program, if under the terms of any agreement or contractual arrangement resulting from this RFP, Contractor subcontracts any Work, then Contractor must make a good faith effort to utilize VetHUBs certified by the Procurement and Support Services Division of the Texas Comptroller of Public Accounts. Proposals that fail to comply with the requirements contained in this **Section 2.5** will constitute a material failure to comply with advertised specifications and will be rejected by University as non-responsive. Additionally, compliance with good faith effort guidelines is a condition precedent to awarding any agreement or contractual arrangement resulting from this RFP. Proposer acknowledges that, if selected by University, its obligation to make a good faith effort to utilize VetHUBs when subcontracting any Work will continue throughout the term of all agreements and contractual arrangements resulting from this RFP. Furthermore, any subcontracting of Work by the Proposer is subject to review by University, to ensure compliance with the VetHUB program.
- 2.5.2 University has reviewed this RFP in accordance with [34 TAC §20.285](#), and has determined that subcontracting opportunities are probable under this RFP.
- 2.5.3 A Subcontracting Plan (SP) is a required part of the proposal. The SP will be developed and administered in accordance with University's Policy on Utilization of VetHUB Businesses, attached as **APPENDIX THREE**.

Each Proposer must complete and return the SP in accordance with the terms and conditions of this RFP, Including **APPENDIX THREE**. Proposers that fail to submit the SP will be considered non-responsive to this RFP as required by §2161.252, Government Code.

Questions regarding the SP may be directed to:

Contact: **Rebecca A. Mendez, HUB Program Manager**

Phone: **210-562-6300**

Email: HUBAdmin@uthscsa.edu

OR

Contact: **Mary Minier, HUB Specialist**

Phone: **210-562-6326**

Email: HUBAdmin@uthscsa.edu

Contractor will not be permitted to change its SP unless: (1) Contractor completes a new SP in accordance with the terms of **APPENDIX THREE**, setting forth all modifications requested by Contractor, (2) Contractor provides the modified SP to University, (3) University approves the modified SP in writing, and (4) all agreements resulting from this RFP are amended in writing to conform to the modified SP.

2.5.4 At the same time Proposer submits its proposal (*no later than the Submittal Deadline* (ref. **Section 2.1**)), Proposer must submit the following VetHUB materials:

(a) **One (1) complete electronic copy of Proposer's SP through the [Euna Procurement Portal](#).**

2.5.5 University extends Proposer an opportunity to seek a courtesy review of its draft SP by University's HUB Office before the Submittal Deadline by emailing draft SP to HUBAdmin@uthscsa.edu.. The informal courtesy review is designed to help address questions Proposer may have about how to complete its SP properly. Acknowledgement or comment on Proposer's draft SP by University will not constitute formal approval of the SP and will not eliminate the need for Proposer to submit its final SP to University as instructed by **Section 2.5**.

2.6 Pre-Proposal Meeting

University will hold a Pre-Proposal Meeting from **10:15 AM to 10:45 AM**, Central Prevailing Time on **Thursday – October 15, 2026**, via Microsoft TEAMS. The Pre-Proposal Conference will allow all Proposers an opportunity to ask University's representatives relevant questions and clarify provisions of this RFP.

Microsoft Teams meeting

Join: <https://teams.microsoft.com/meet/25551483993593?p=xm9qUCBUfpVfl7JFoD>

Meeting ID: 255 514 839 935 93

Passcode: 8Qm9VS68

2.7 Vendor Presentation

University reserves the right to hold Vendor Presentation in person at the University of Texas Health Science Center at San Antonio (or virtual). **The dates and times to be determined** after the first round of evaluations. **Not all vendors** may be invited to participate in these presentations, all dependent on first round of evaluation scores.

SECTION 3

SUBMISSION OF PROPOSAL

3.1 Submission

Proposals must be received electronically through the University's online Procurement Portal via [Euna](#), on or before the Submittal Deadline (ref. **Section 2.1** of this RFP). Competitive Bids will be listed on the Procurement Portal, and submissions will only be accepted through the portal.

University **WILL NOT** accept proposals submitted by paper, telephone, facsimile ("FAX") transmission, or electronic mail (i.e., e-mail) in response to this RFP.

You can register for a free account by clicking [here](#), which will be required when you prepare a submission. As part of the registration process, you may select Commodity Codes to associate with your account. This will open you up for notifications of opportunities matching your chosen codes.

If you encounter technical issues while preparing and/or submitting your proposal – **you must contact Euna directly.**

3.2 Proposal Validity Period

Each proposal must state that it will remain valid for University's acceptance for a minimum of **two hundred and forty days (240)** days after the Submittal Deadline, to allow time for evaluation, selection, and any unforeseen delays

3.3 Terms and Conditions

3.3.1 Proposer must comply with the requirements and specifications contained in this RFP, including the Agreement (ref. **APPENDIX TWO**), the Notice to Proposer (ref. **Section 2**), Proposal Requirements (ref. **APPENDIX ONE**) and the Specifications and Additional Questions (ref. **Section 5**). If there is a conflict among the provisions in this RFP, the provision requiring Proposer to supply the better quality or greater quantity of services will prevail, or if such conflict does not involve quality or quantity, then interpretation will be in the following order of precedence:

- A. Specifications and Additional Questions (ref. **Section 5**).
- B. Agreement (ref. **APPENDIX TWO**).
- C. Proposal Requirements (ref. **APPENDIX ONE**).
- D. Notice to Proposers (ref. **Section 2**).

3.4 Submittal Checklist

Proposer is instructed to complete, sign, and return the following documents as a part of its proposal. If Proposer fails to return each of the following items with its proposal, then University may reject the proposal:

- 3.4.1 Signed and Completed Execution of Offer (ref. **Section 2** of **APPENDIX ONE**).
- 3.4.2 Signed and Completed Pricing and Delivery Schedule (ref. **Section 6**).
- 3.4.3 Responses to Proposer's General Questionnaire (ref. **Section 3** of **APPENDIX ONE**).
- 3.4.4 Signed and Completed Addenda Checklist (ref. **Section 4** of **APPENDIX ONE**).
- 3.4.5 Signed and completed General Terms and Conditions (ref. **Section 4** of **APPENDIX ONE**).
- 3.4.6 Responses to questions and requests for information in the Specifications and Additional Questions Section (ref. **Section 5**).
- 3.4.7 Signed and completed originals of the VetHUB Subcontracting Plan or other applicable documents (ref. **Section 2.5** and **APPENDIX THREE**).
- 3.4.8 Completed Risk Assessment) (ref. **APPENDIX FOUR**).
- 3.4.9 Completed and Signed TX-RAMP Notice **OR** FedRamp (ref **APPENDIX FIVE**).
- 3.4.10 Completed Policy Driven Adoption for Accessibility (PDAA) Vendor Assessment (ref **APPENDIX SIX**)
- 3.4.11 Completed Accessibility Conformance Report (ACR) and/or VPAT (ref **5.2 MINIMUM REQUIREMENTS**).
- 3.4.12 Completed Vendor Accessibility Dev Service Infor Request (VADSIR) (ref. **5.2 MINIMUM REQUIREMENTS**).
- 3.4.13 Completed AI Governance (ref. **APPENDIX SEVEN**).
- 3.4.14 Completed and Signed RFP/RFB Process Notification (ref. **APPENDIX EIGHT**).

SECTION 4

GENERAL TERMS AND CONDITIONS

See Attached in Euna

5.1 General

Minimum requirements and specifications for Work, as well as certain requests for information to be provided by Proposer as part of its proposal, are set forth below. As indicated in **Section 2.3**, Contractor means the successful Proposer.

5.2 Minimum Requirements

Each Proposal must include information that clearly indicates that Proposer meets each of the following minimum qualification requirements:

- 5.2.1 Minimum of FIVE (5) years of experience in providing and implementing an Organizational Design and Workforce Planning application and consulting companies.
- 5.2.2 Proven experience supporting organizations with employee data maintained across multiple HRIS systems (Oracle and PeopleSoft)
- 5.2.3 Be authorized to conduct business in the State of Texas.
- 5.2.4 Possess and maintain all required licenses, certificates, employer identifier, and any additional required documentation to conduct business with UT San Antonio.
- 5.2.5 Pursuant to [1 TAC §213.38 \(b\)](#), UT Health requires documentation providing credible evidence that the products to be included in this bid are accessible for use by persons with disabilities.
 - A. A completed self-assessment using the Policy Driven Adoption for Accessibility (PDAA) (**APPENDIX SIX**) maturity model, using the [PDAA template provided by the Texas Department of Information Resources](#).
 - B. A completed Vendor Accessibility Development Services Information Request (VADSIR), using the [VADSIR template provided by the Texas Department of Information Resources](#).
 - C. Other documentation of vendor's capability or ability to produce accessible products and services, which may include:
 - 1. Vendor's internal accessibility policy documents,
 - 2. Contractual warranties for accessibility,
 - 3. Accessibility Conformance Reports (ACRs), based on the [VPAT](#) or [OpenACR formats](#), for similar products or services previously provided by the vendor,
 - 4. Accessibility testing documentation, and
 - 5. Other examples of prior work results

- 5.2.6 Proposer must have, or obtain, a **TX-RAMP Level II Certification** (APPENDIX FIVE) from DIR (Texas Department of Information Resources) prior to contract execution. Information on TX-RAMP can be found on the Texas [DIR](#) website. **Please begin TX-RAMP Certification as soon as possible if proposer is not already certified.**

5.3 Additional Questions Specific to this RFP

Proposer must submit the following information as part of Proposer's proposal:

- 5.3.1 If Proposer takes exception to any terms or conditions set forth in **APPENDIX TWO**, *Proposer must submit a list of the exceptions. The University **WILL NOT** consider any modifications to the University's Standard Terms and Conditions **AFTER** submittal deadline.*
- 5.3.2 By signing the Execution of Offer (ref. Section 2 of **APPENDIX ONE**), Proposer agrees to comply with Certificate of Interested Parties laws (ref. [§2252.908, Government Code](#)) and [1 TAC §§46.1 through 46.5](#)) as implemented by the Texas Ethics Commission (TEC), including, among other things, providing TEC and University with information required on the form promulgated by TEC. *Proposer may learn more about these disclosure requirements, including the applicable exceptions and use of the TEC electronic filing system, by reviewing §2252.908, Government Code, and information on the TEC website at https://www.ethics.state.tx.us/resources/FAQs/FAQ_Form1295.php.*
The Certificate of Interested Parties must only be submitted by Contractor upon delivery to University of a signed Agreement.
- 5.3.3 [UTS165](#) defines "Information Resources" as any and all computer printouts, online display devices, mass storage media, and all computer-related activities involving any device capable of receiving email, browsing Web sites, or otherwise capable of receiving, storing, managing, or transmitting Data including, but not limited to, mainframes, servers, Network Infrastructure, personal computers, notebook computers, hand-held computers, personal digital assistant (PDA), pagers, distributed processing systems, network attached and computer controlled medical and laboratory equipment (i.e. embedded technology), telecommunication resources, network environments, telephones, fax machines, printers and service bureaus. Additionally, it is the procedures, equipment, facilities, software, and Data that are designed, built, operated, and maintained to create, collect, record, process, store, retrieve, display, and transmit information.
- 5.3.4 [UTS165](#) defines "Data" as recorded data, regardless of form or media in which it may be recorded, which constitute the original data necessary to support the business of UT System or original observations and methods of a study and the analyses of such original data that are necessary to support research activities and validate research findings. Data includes, but is not limited to printed records, observations and notes; electronic data; video and audio records, photographs and negatives):
- 5.3.5 UTHSA has determined that this project will require **ALL** Proposers to complete the **Risk Assessment (Appendix Four)**. The Risk Assessment will establish specifications, representations, warranties, and agreements related to the EIR IT Security that Proposer is offering to provide to the University. Response to **Appendix Four** will be incorporated into the Agreement and will be binding on Contractor.

5.4 Scope of Work

The selected vendor will provide a comprehensive organizational design and workforce planning platform, including implementation services, configuration, integration, data enablement, training, change management support, and ongoing technical and functional support as appropriate.

The scope is expected to include, but is not necessarily limited to, the following capabilities. All capabilities listed below require the ability to integrate, manage, and consolidate workforce data from multiple HRIS systems concurrently.

5.4.1 Current-State Organizational Visibility

The platform should provide a comprehensive and dynamic view of the Institution's current organizational and workforce environment, including the ability to:

- A. Represent complex organizational structures and reporting relationships.
- B. Generate current state organizational charts to visualize organizational hierarchies, departments, business units, schools, clinical entities and other organizational components. Maintain visibility into positions, jobs, roles, incumbents, vacancies, and workforce attributes.
- C. Identify organizational layers, spans of control, reporting relationships, and management structures.
- D. Support analysis across multiple organizational[CJ1.1][BL1.2] (Ref 5.4.1 – B) dimensions and levels.
- E. Provide configurable dashboards, reports, and visualizations for executives, leaders, workforce planners, HR, finance, and other authorized users.
- F. Establish a reliable baseline of the current state to support merger integration and future-state planning.

5.4.2 Organizational Design

The solution should enable leaders and designated users to evaluate and design organizational structures aligned with strategic and operational objectives.

Capabilities should include, as applicable:

- A. Designing proposed organizational structures and reporting relationships.
- B. Evaluating organizational layers and spans of control.

- C. Identifying opportunities for consolidation, alignment, simplification, or restructuring.
- D. Comparing current state and proposed organizational structures.
- E. Modeling organizational changes before implementation.
- F. Supporting organizational design principles, standards, and governance.
- G. Documenting the rationale and assumptions underlying proposed organizational changes.
- H. Assessing potential impacts of organizational changes on workforce, positions, roles, and reporting relationships.
- I. Supporting multiple organizational design scenarios and alternatives.

5.4.3 Workforce Planning

The platform should provide capabilities to forecast and plan future workforce requirements based on strategic, operational, financial, and other relevant drivers.

The solution should support:

- A. Current-state workforce assessment.
- B. Future-state workforce demand forecasting.
- C. Workforce supply analysis.
- D. Identification of workforce gaps, surpluses, and capability needs.
- E. Position and headcount planning.
- F. Vacancy and planned-position management.
- G. Skills and capability planning, where applicable.
- H. Workforce segmentation and analysis.
- I. Planning by organizational unit, job family, role, location, workforce type, or other relevant dimensions.
- J. Alignment of workforce plans with strategic initiatives and organizational priorities.
- K. Multi-year workforce planning and forecasting.

5.4.4 Scenario Planning and Modeling

Given the Institution's merger and rapid growth environment, scenario modeling is a critical requirement.

The platform should allow authorized users to create, evaluate, compare, and modify alternative organizational and workforce scenarios, including:

- A. Merger and organizational integration scenarios.
- B. Growth and expansion scenarios.
- C. Service-line or program expansion.
- D. Organizational restructuring.
- E. Centralization or decentralization of functions.
- F. Changes in operating models.
- G. Changes in workforce mix.
- H. Position creation, elimination, consolidation, or redistribution.
- I. Changes in management structures and spans of control.
- J. Alternative staffing models.
- K. Changes in workforce demand, productivity, or capacity assumptions.

Scenarios should, where feasible, demonstrate the organizational, workforce, and financial implications of proposed changes and allow decision-makers to compare alternatives using consistent assumptions and metrics.

5.4.5 Merger and Organizational Integration Support

The solution should support the Institution's ongoing merger and integration activities.

The platform should facilitate, as appropriate:

- A. Mapping legacy organizational structures into an integrated organizational model.
- B. Comparison of legacy organizational structures, positions, jobs, and workforce populations.
- C. Identification of duplicate, overlapping, or complementary functions.
- D. Development and evaluation of future state structures.
- E. Tracking organizational integration activities and decisions.

- F. Scenario modeling for alternative integration approaches.
- G. Identification of workforce impacts associated with integration decisions.
- H. Establish consistent organizational and workforce data across previously separate entities.

5.4.6 Data Integration and Data Management

The solution must be capable of integrating with the Institution's existing technology and data environment across both campuses.

The selected vendor should describe capabilities for:

- A. Integration with the Institution's HR/HCM system(s). (Oracle and PeopleSoft).
- B. Integration with financial, budgeting, planning, ERP, or other relevant systems.
- C. Import and export of organizational, position, workforce, and financial data.
- D. Automated or scheduled data refreshes.
- E. Data validation and reconciliation.
- F. Data quality monitoring.
- G. Historical data management.
- H. Role-based access and data security.
- I. Auditability and tracking of changes.
- J. Support for enterprise reporting and analytics environments.

The Institution expects the selected vendor to work collaboratively with appropriate institutional stakeholders to establish data definitions, ownership, governance, security, and integration processes.

5.4.7 Financial and Workforce Alignment

Because workforce planning is closely connected to financial sustainability, the platform should support integration between workforce plans and financial considerations.

Capabilities may include:

- A. Workforce cost modeling.
- B. Position and Full Time Equivalent (FTE) cost projections.
- C. Comparison of workforce scenarios based on financial assumptions.
- D. Alignment of workforce plans with budget cycles.
- E. Identification of financial implications associated with organizational changes.
- F. Integration with existing financial planning and budgeting processes.

The Institution will favor solutions that reduce duplication between workforce planning and financial planning and provide a common view of workforce-related assumptions and impacts.

5.4.8 Governance[CJ2.1][BL2.2], Workflow, and Decision Management

The platform should support an appropriate governance model for enterprise organizational design and workforce planning.

Capabilities should include:

- A. Configurable workflows and approval processes.
- B. Role-based access and permissions.
- C. Assignment of planning responsibilities.
- D. Documentation of assumptions and decisions.
- E. Version control and scenario management.
- F. Audit trails.
- G. Standardized planning methodologies and templates.

The solution should support both centralized enterprise governance and delegated planning by authorized organizational units.

5.4.9 Implementation and Configuration

The selected vendor will be expected to provide implementation services necessary to configure and deploy the platform successfully.

Implementation activities should include, at minimum:

- A. Discovery and requirements validation.
- B. Solution design.
- C. Data assessment and mapping.
- D. Configuration and customization, as appropriate.
- E. Integration development and testing.
- F. Data migration and/or initial data loading.
- G. User acceptance testing support.
- H. Security and access configuration.
- I. Deployment planning.
- J. Production implementation.
- K. Post-implementation stabilization.

The Institution expects the vendor to recommend an implementation approach that appropriately balances speed, quality, risk management, and the need to support an organization undergoing significant transformation.

5.4.10 Training, Adoption, and Change Management

Because the platform will introduce new approaches to organizational design and workforce planning, the selected vendor should provide a comprehensive enablement strategy.

This should include, as appropriate:

- A. Administrator training.
- B. End-user and planner training.
- C. Executive and leadership orientation.
- D. Training materials and documentation.
- E. User guides and knowledge resources.

- F. Change management support.
- G. Adoption strategies.
- H. Train-the-trainer capabilities.
- I. Post-go-live support and reinforcement.

The Institution is particularly interested in approaches that promote sustainable internal capability rather than long-term dependence on vendor resources.

5.4.11 Ongoing Support and Continuous Improvement

The selected vendor should provide ongoing technical and functional support following implementation.

Proposals should address:

- A. Application support.
- B. Technical support and issue resolution.
- C. System maintenance and upgrades.
- D. Product enhancements.
- E. Release management.
- F. Performance monitoring.
- G. Customer success/account management.
- H. User support.
- I. Periodic optimization and health assessments.
- J. Opportunities to expand platform capabilities as institutional needs evolve.

5.5 Expected Outcomes

The Institution expects the selected solution to contribute to measurable improvements in the way organizational and workforce decisions are made. Desired outcomes include:

- A. Improved organizational visibility through a reliable, enterprise-wide view of organizational structures and workforce information.
- B. More effective merger integration through the ability to compare, map, consolidate, and redesign legacy organizational structures.
- C. Data-driven workforce decisions are supported by current, reliable, and actionable workforce information.
- D. Improved organizational design through consistent methodologies for evaluating layers, spans of control, reporting relationships, organizational structures, and workforce alignment.
- E. Stronger workforce forecasting through the ability to model future workforce demand, supply, capabilities, and costs.
- F. Faster scenario analysis through tools that allow leaders to evaluate multiple organizational and workforce alternatives before decisions are implemented.
- G. Greater alignment between workforce and financial planning through integrated assumptions, forecasts, and scenario analysis.
- H. Improved transparency and governance through standardized processes, workflows, assumptions, and decision documentation.
- I. Scalable planning capabilities that can accommodate continued growth, organizational change, and evolving strategic priorities.
- J. Sustainable internal capability that enables institutional leaders and workforce planners to independently use the platform for ongoing organizational design and workforce planning.

5.6 Scope Considerations

- A. The Institution recognizes that organizational design and workforce planning are interconnected disciplines that may involve HR, finance, strategy, operations, academic leadership, clinical leadership, research administration, and other institutional stakeholders. Respondents should therefore describe how their proposed solution and implementation methodology can support cross-functional planning while maintaining appropriate governance, confidentiality, security, and role-based access.
- B. Respondents should clearly distinguish between standard product functionality, configuration, third-party functionality, custom development, and vendor-provided professional services. Proposals should also identify any assumptions, dependencies, or institutional resources required for successful implementation.
- C. The Institution may elect to phase implementation based on organizational readiness, merger priorities, technology dependencies, and available resources. Respondents should therefore describe a recommended phased approach, including potential minimum viable capabilities, subsequent enhancements, and a roadmap for expanding the platform over time.
- D. The Institution reserves the right to refine, prioritize, or modify elements of the scope during the procurement and implementation process based on demonstrated capabilities, organizational priorities, and the recommendations of the selected vendor.

5.7 Group Purchasing Organization (GPO):

If Proposer is part of any GPO, provide the GPO Name, Contract(s) Number, and other pertinent information.

5.8 Add or Delete Services

UTHSA is continuing to grow clinical, research, and educational services, which may require additional service locations or facilities to be added or removed during the term of this agreement. The agreement that results from this RFP may need to be modified during its term to reflect these locations modifications. Proposer agrees that the University has the right to add or delete services and locations which are available from the Proposer during the effective period of the contract. The University and the Proposer, prior to execution of services, shall mutually agree upon the scope and price, in writing, for any such additional services. In addition, the University has the right to modify, replace, upgrade, or delete services and locations during the effective period of this contract. The University and the Proposer, prior to modification or services shall mutually agree in writing before modifying services. As well as special notice in **Section 1.2 Background and Special Circumstances**.

SECTION FOUR
TERMS AND CONDITIONS

SECTION SIX
PRICING AND DELIVERY SCHEDULE

APPENDIX ONE
SECTION 1 – GENERAL INFORMATION
SECTION 2 – EXECUTION OF OFFER
SECTION 3 – GENERAL QUESTIONNAIRE
SECTION 4 – ADDENDA CHECKLIST

APPENDIX TWO
SAMPLE AGREEMENT

APPENDIX THREE
VETHUB SUBCONTRACTING PLAN

APPENDIX FOUR
RISK ASSESSMENT

APPENDIX FIVE
TX-RAMP NOTICE

APPENDIX SIX
POLICY DRIVEN ADOPTION FOR ACCESSIBILITY (PDAA)
VENDOR ASSESSMENT

APPENDIX SEVEN:
AI GOVERNANCE

APPENDIX EIGHT
RFP/RFB PROCESS NOTIFICATION

See Attached in Euna