Solicitation Information
1 March 05

LOI # B04837

TITLE: Research Based Outreach Strategy

Submission Deadline: 24 March 05 @ 2:30 PM (Eastern Time)

PRE-BID/ PROPOSAL CONFERENCE: Yes Date: 10 March 05 Time: 2:30 PM
Mandatory : No
Location: Department of Administration / Division of Purchases (Bid Room), One Capitol Hill, Providence, RI

Questions concerning this solicitation may also be e-mailed to the Division of Purchases at questions@purchasing.state.ri.us no later than **9 March 05 @ at 12:00 Noon (ET)** .Questions should be submitted in *a Microsoft Word attachment*. Please reference the RFP / LOI # on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

Jerome D. Moynihan, C.P.M., CPPO
Administrator of Purchasing Systems

Vendors must register on-line at the State Purchasing Website at www.purchasing.ri.gov.

NOTE TO VENDORS:

Offers received without the entire completed three-page RIVP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

The Rhode Island Department of Administration, Office of Purchases, on behalf of the State of Rhode Island, Department of Health, is requesting Letters of Interest from qualified individuals or companies to conduct a comprehensive research-based outreach strategy to engage and enroll consumers in a state wide Master Patient Index system which will allow patients to permit having their health care information shared among their health care providers electronically, in accordance with the terms of this solicitation. Consumer participation is a key element to the success of the Master Patient Index (MPI) not only because patients need to be able to control who can access their information, but also because a provider's motivation to use the Index will depend in large part on how many of his/her patients are willing to participate.

Background: Rhode Island is one of five states to be awarded a 5 million dollar, 5-year contract from the Agency For HealthCare Research and Quality (AHRQ). The goal is to create a system of connectivity among health care providers that will allow treating physicians, with their patient's permission, to access important patient health data from a variety of sources at the time of a visit while protecting the confidentiality and security of patient information. Access to the data will be controlled by the patient. Consumers' input will be critical in addressing privacy, logistics, and other concerns in order to build a solution that can meet both patient and provider needs, and addresses the technical, and educational issues that will be necessary to ensure their full participation. In order to accomplish this overall goal, a Master Patient Index will be created. The MPI will contain its own unique patient identifier and a collection of "keys" (unique identifiers of the clinical data systems sharing data) to the databases where clinical information concerning the patient is stored. It is anticipated that when a patient enrolls in this project, a unique "Key" will be given to the patient. Each participating provider will also have its own provider identifier (key). A care provider will access the MPI using a secure connection that will authenticate the provider by requiring the provider to supply their identifying provider key as well as a patient key. The format of the patient key (smart card. PIN number, consent field, etc) will be determined through the research gathered as part of this contract.

The Department of Health (HEALTH) is seeking expert consultant services to optimize engagement of consumers in this Master Patient Index project. A strong emphasis will be placed on in-depth knowledge of consumer based market research strategies, the development of methods for marketing consumer based health care services and experience in working with health care providers as well as consumers in both the private and public sectors. Individuals who can demonstrate their knowledge, experience and accomplishments in these areas are encouraged to submit Letters of Interest in response to this Request.

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

Potential offerors are advised to review all sections of this solicitation carefully, and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request will be rejected as being non-responsive.

The state reserves the right to award to one or more offerors.

All costs associated with developing or submitting a proposal in response to this Request, or to provide oral or written clarification of its content shall be borne by the offeror. The State assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

Proposal misdirected to other State locations or which are otherwise not present in the Office of Purchases at the time of opening for any cause will be determined to be late and will not be considered. The official time clock is located in the reception area of the DOA / Division of Purchases.

In accordance with Title 7, Chapter 1.1 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). *This is a requirement only of the selected vendor.*

It is intended that an award pursuant to this Request will be made to a prime contractor who will assume responsibility for all aspects of the work. Joint ventures and cooperative proposals will not be considered, but subcontracts are permitted, provided that their use is clearly indicated in the offeror's proposal, and the proposed subcontractor(s) are identified in the proposal.

Bidders are advised that all materials submitted to the State of Rhode Island for consideration in response to this Letter of Interest will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request, once an award has been made.

NOTICE:

THERE MAY BE ADDITIONAL ADDENDA TO THIS LOI AT ANY TIME BEFORE THE OPENING DATE AND TIME.

THE DIVISION OF PURCHASES WILL **NOT** BE NOTIFYING BY MAIL OF ANY SUCH ADDENDA.

IT IS THE **VENDOR'S RESPONSIBILITY** TO **CHECK** AND **DOWNLOAD** ANY AND ALL ADDENDA.

AN ADDENDUM TO A LOI IS LISTED AS THE BID NUMBER WITH AN "A" AND THE NUMBER OF THE ADDENDUM FOLLOWING: FOR EXAMPLE, 3025A1 INDICATES ADDENDUM #1 HAS BEEN ISSUED FOR BID#3025. 3025A2 INDICATES THAT ADDENDUM #2 HAS BEEN ISSUED.

YOU MUST CLICK ON ALL OF THESE LISTINGS TO GET THE ***COMPLETE PACKAGE***.

The State of Rhode Island has a goal of 10% participation by MBEs in all State procurements. For further information, visit the web site at *www.rimbe.org*. To speak with an MBE Officer, call (401) 222-6253

TOPIC AREAS FOR SERVICES COVERED BY THIS REQUEST INCLUDE, BUT ARE NOT LIMITED TO:

Year One:

- **Master Patient Index (MPI) Background Research:** conducting an in-depth literature review of journals, meetings abstracts, web sites, and other publications concerning the development of a statewide master patient index in order to identify: 1) potential barriers to and opportunities for patient participation experienced by individual healthcare systems, other states, and foreign countries; 2) key informants in the government, healthcare, and IT vendor communities who could provide insight into critical patient issues related to MPI development and implementation. Examples of potential sources of information include the Massachusetts Health Data Consortium, E- Health Initiative, Canada Health Infoway, and Patient Safety Institute (PSI).

  The results of the literature should help guide development of the primary research strategy with consumers by suggesting research issues that might cut across various audiences, (such as an individual's level of concern about privacy issues) or by identifying new ways to subdivide specific target audiences (members of an ethnic group might respond differently to an MPI based on their immigration documentation status.)

- **Intercept Interviews with Rhode Island Healthcare Consumers:** Conduct primary research with Rhode Island consumers through waiting room intercept interviews in each of the healthcare settings participating in the initial phase of the MPI. Conduct at least 30 15-minute interviews to identify consumer needs, concerns, and willingness to use the system, as well as ideas for enrolling consumers and issuing their "key". Working closely with healthcare facility administrators, develop an interview protocol that includes incentives to participate, a private place in which to conduct the interview, and procedures to comply with informed consent and HIPAA requirements.

- **Develop Consumer Outreach and Enrollment Plan:** Based on the results of the research phase, craft a proposed strategy for a marketing campaign to meet the goal of enrolling participants in the MPI. The plan should include an overall campaign strategy, proposed messages, types of materials, and content information for identified target audiences. In addition to promoting the use of the MPI, it should also include suggestions for facilitating enrollment and issuing individual keys, so that the entire rollout process is constructed with maximum patient participation in mind. Due to the fact that research has shown that patients trust their doctors when it comes to receiving healthcare information, It is anticipated that providers themselves will be the main vehicle for the dissemination of information about the MPI and may be the prefer method for enrolling their patients in the MPI. Other possible strategies to educate or enroll consumers may include:
  - ✓ Training and information for health plans, medical/administrative, and community based organization staff to help them explain the MPI to patients;

- ✓ Posters, fact sheets, and brochures in various languages in healthcare facilities where the MPI will be instituted;
- ✓ Direct mail to patients affiliated with participating healthcare facilities; and
- ✓ Developing partnerships with insurers to distribute information through regular mailings, newsletters, and communication with employers.

- **Develop and Test Materials and Outreach/Enrollment Plan:** Upon agreement of the outreach strategy, develop draft educational materials for consumers, then test the proposed outreach approach, draft materials, and potential enrollment methods with consumers through waiting room intercept interviews in the same locations where the initial research was conducted.

- **Implement Consumer Outreach Plan:** Collaborate with the provider engagement vendor (selected by HEALTH) to distribute the materials to healthcare facilities, insurers, and community-based centers involved in the initial rollout of the MPI. In addition to arming providers with materials to educate their patients, and coordination with providers participating in the MPI, offer to direct mail information to their patients about enrolling in the system. Careful coordination of the consumer and provider efforts will ensure that physicians will be prepared to answer patients' questions about the MPI, avoiding the confusion/resentment that could occur if the efforts were poorly timed.

- **Consumer Advisory Committee:** Assist (as needed) with the development, staffing and operations of the Consumer Advisory Committee. This committee is part of the Governing structure for this MPI project. Utilize this committee to guide overall development of the consumer outreach and enrollment plan. Seek guidance, input and consensus on deliverables of this letter of interest. This will be an ongoing activity throughout the course of the contract.

<u>Year 2 Activities</u>

- **Conduct Consumer Focus Groups:** conduct a total of at least 8 focus groups with consumers who have enrolled in the MPI, and those who have chosen not to enroll. For enrollees, the research will explore:
  - Motivations for enrolling;
  - Processes undertaken to enroll;
  - Ability to remember PIN codes; and
  - Overall satisfaction with enrollment and participation in the system.

  Also conduct research with consumers who have chosen not to enroll and investigate:
  - Awareness and knowledge of the MPI;
  - Barriers to enrollment; and
  - Attitudes towards enrolling in the future.

  Recruitment for both audiences will take place through flyers posted in the healthcare facilities participating in the MPI. Focus groups will last 90 minutes each, and participants will be given a stipend for participating.

  - **Interviews with Providers and their Patients around Enrolling in the MPI:** In order to better understand the interactions between patients and their individual

providers regarding the MPI, identify at least 5 medical settings in which to continue to research the use of the Index. Develop separate 5 – 7 minute questionnaires that can be administered to 25 physicians and 25 of their patients, comparing results on a number of issues, including:

- Physicians' views of the way in which they explain the MPI to patients
- Patients' understanding of the physician's explanation of the MPI
- Explicit and implicit cues from both groups indicating support or opposition to the MPI; and
- Opportunities to improve communication between physicians and patients on the use of the MPI.

Consumers should be provided a small stipend as an incentive for to complete the 5-7 minute interview.

- **Revise Patient Outreach Plan, Develop and Distribute Additional Materials:** Using the results of this research, revise the patient outreach plan developed in year 1, and make necessary revisions to the patient outreach materials. As glitches in the MPI are worked out; as enrollment processes evolve; and as the benefits of the system become clearer; ensure that consumers are given up-to-date, accurate information on how and why they should enroll in the system. At this stage in the process, a second direct mailing to consumers who belong to the healthcare facilities in the initial phase of the MPI rollout may be justified. Additionally, information will be need to distributed to consumers of new healthcare facilities that join the MPI over time.

Years 3 Activities:

- Work with management team of the project and the participating providers to produce and distribute materials to consumers about the MPI. Depending on what research findings yield during years 1 and 2, a variety of social marketing tactics should be employed to ensure usage of the system by the maximum amount of eligible consumers. In addition to print materials, radio PSAs might be appropriate to educate consumers about the MPI to convince them of the benefits of enrollment.

The vendor selected as a result of this request will be responsible to the MPI Project Manager. A purchase order and contract will be issued approximately April 1, 2005 through March 31, 2008. The award may be renewed up to two additional 12-month periods at the exclusive option of the state, based on vendor performance and the availability of funds. *Any award resulting from this request will be subject to the state's General Conditions of Purchase, available from the Internet at www.purchasing.state.ri.us., as well as the terms of this request.*

QUALIFICATIONS:

- Project staff must be have significant in-depth knowledge of and experience in conducting and implementing consumer based market research strategies, developing methods for marketing consumer based health care services with health care, implementation of outreach and education campaigns, and experience in working with health care providers as well as consumers in both the private and public sectors .
- Demonstrated experience working on health care projects, in both the private and public sectors.

- At least five years of professional expertise in this areas of interest
- Demonstrated skills and abilities in working with both diverse groups as well as one-on-one with executive managers, health care providers, and consumers .
- Ability to demonstrate success in projects developed and deployed

Interested individuals should submit Letters of Interest containing the following information:

- A description of the background and qualifications of the offeror;
- A description of the offeror's experience working in the Health care consumer marketing industry and with public and private sectors;
- Curriculum Vitaes of proposed staff should be attached;
- A list of references for other clients utilizing similar services must be attached.
- A cost proposal and budget narrative inclusive of all costs related to this project; ie, personnel, fringe benefits, operational expenses. Please submit a budget & narrative for years one, two and three.

Questions concerning this solicitation may be e-mailed to the Division of Purchases, in accordance with the terms & conditions listed on page one of this solicitation. Please reference LOI# on all correspondence. Responses to all questions will be provided as an Addendum to LOIO # and posted on the Rhode Island Division of Purchases Internet Home Page at www.purchasing.state.ri.us. It is the responsibility of all interested offerors to download the information. If technical assistance is required to download, call the Help Desk at (401) 222-2142, ext 134.

Letters of Interest to provide the services covered by this Request must be received by the Division of Purchases on or before the date and time listed on the cover page of this solicitation. Responses received after this date as registered by the official time clock in the reception are of the Division of Purchases will not be considered.

Responses (an original plus three (3) copies) should be mailed or hand-delivered in a sealed envelope marked "LOI# B04837: Research Based Outreach Strategy" to:

By Courier:	**By Mail:**
RI Dept. of Administration **Division of Purchases, 2nd floor** **One Capitol Hill** **Providence, RI 02908-5855**	**R.I. Department of Administration** **Division of Purchases** **P.O. Box 6528** **Providence, RI 02940-6528**

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other State locations or which are otherwise not presented in the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed or emailed to the Division of Purchases will not be considered. The official time clock is located in the reception area of the Division of Purchases

RESPONSE CONTENTS

Responses must include the following:

1. An R.I.V.I.P. generated bidder certification cover sheet (downloaded from the RI Division of Purchases Internet home page at http://www.purchasing.state.ri.us,

2. A statement of experience describing the Vendor's background, qualifications, and experience with and for similar projects, and all information described earlier in this solicitation

3. Any suggested revisions to the methodology outlined with a rationale as to why a different methodology is being proposed

4. A completed and signed W-9 downloaded from the RI Division of Purchases Internet home page at http://www.purchasing.state.ri.us,

5. One copy of the offeror's complete response to this solicitation is requested in an electronic format, CDROM or disk, in Microsoft Office or PDF file formats

6. A cost proposal describing the fee structure for the services requested in this solicitation.

EVALUATION CRITERIA

Responses will be evaluated using the following criteria:

- **Capability (background) and qualifications** are clearly demonstrated (0-25 points);
- **A comprehensive listing of similar projects undertaken** utilizing an in-depth knowledge of consumer based market research strategies, developing of methods for marketing consumer based health care services with health care and experience in working with health care providers as well as consumers in both the private and public sectors (0-25 points)
- **A clear understanding of the State's requirements** and the results intended and desired under this contract has been demonstrated by the offeror (0-25 points);
- **A complete resume is attached for each proposed staff person to be employed on this project.** (0-10 points)
- **A cost proposal** listing personnel & hourly wage for each, and a breakdown of operational costs is attached. (0-20 points).
  (Lowest cost / cost of proposal being evaluated X maximum point allowance = Cost Point Allocation)

Not withstanding the above, the State reserves the right to accept or reject any or all offers. The State also reserves the right to award in whole or in part, to award on the basis of cost alone, and to act in its best interest. Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The State may, at its sole option, elect to require presentations by offerors clearly in consideration for an award. A Technical Review Sub-Committee will review the proposals

based on the Evaluation Criteria and present written findings, including the results of all evaluations, to the State's Architect/Engineer and Consultant Services Selection Committee, which may recommend up to three finalists to the Director of the Department of Administration who will make the final selection.