National Consortium of Telehealth Resource Centers

Center for Connected Health Policy/Public Health Institute

2520 Venture Oaks Way, Suite 180

Sacramento, CA 95833

REQUEST FOR PROPOSAL

Data Collection Tool

RFP #2019-100

Request for Proposals Release Date: March 6th, 2019

Bidder's Conference*: March 12th, 2019 1:00 PM – 2:00 PM (PT)

(******See Section II for more information on Bidder's Conference*)

Deadline for Submittal of Proposals: March 29th, 2019

NCTRC Contacts:

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I. Introduction

1. Background

The National Consortium of Telehealth Resource Centers (NCTRC) is an affiliation of 14 Telehealth Resource Centers (TRCs) funded individually through cooperative agreements from the Health Resources & Services Administration (HRSA), Office for the Advancement of Telehealth (OAT). The goal of the NCTRC is to increase the consistency, efficiency, and impact of federally funded telehealth technical assistance services. We work to assist health care professionals and organizations with operating cost-effective telehealth programs for medically underserved communities within their regions. The Center for Connected Health Policy (CCHP), a program of the Public Health Institute (PHI), is the administering entity for the NCTRC.

"Telehealth" is a collection of means or methods for enhancing health care, public health, and health education delivery and support using telecommunications technologies. Telehealth helps overcome carriers of time and distance and delivers health services and education in places that lack those resources. Telehealth has existed for decades in some form or another, but it is only in the last few years that it has received increasing attention as a means to achieving the goals of the Triple Aim: efficiency, better health outcomes and better care.

2. Project Description

- *Purpose and Goals*

The purpose of this procurement is to select a software and system development firm to develop and implement a comprehensive data collection and reporting tool with Customer Relationship Management (CRM) functions to be utilized by 14 individual Telehealth Resource Centers (TRCs), who work collaboratively as the National Consortium of Telehealth Resource Centers (NCTRC). Since conception of the NCTRC, there has been an internal effort to standardize our method of data collection and reporting to our federal funder (HRSA).

In the short-term, the goal is to establish an organized data tool that accurately automates and sorts elements of data input. The data tool will be used to record and store data while running accurate calculations to be extracted and transferred to our federal funder's reporting tool "*Performance Improvement Measurement System*" (PIMS). Some key functions the tool should be able to perform include importing data from external documents (such as .csv) to the data tool, track and record with accuracy, and produce concise quality reports. We expect the tool's functionality to evolve as the NCTRC continues to define itself. The tool will need to be positioned to evolve and grow with minimal disruption and cost over the next one to two years.

We are seeking a firm that can conceptualize, design, and program the NCTRC data tool and can work in tandem with 14 separate TRCs. The firm must be adequately experienced in developing data systems, provide options for data housing, and be open to stakeholder involvement in an iterative review process.

We will review all submissions and will score each proposal based on the proposal criteria required, including, but not limited to references, costs, hosting, and a maintenance plan.

3. Data & Appendices Overviews

- *General Data Overview:*

Each TRC is charged with collecting demographics in their respective region from Technical Assistance (TA) requests and reporting this information to our federal funder. These TA requests come from multiple venues, and include but are not limited to, phone calls, emails, webform submissions, etc. We are also mandated to gather data on our Outreach efforts, i.e. attendance at conferences, conference exhibits, and meetings; trainings conducted in-person and virtually; and number of resources we circulate, such as fact sheets, online training modules, webinars, website visits, etc. We work with a diverse audience and can receive TA requests from anyone that has a stake in the field of telehealth. Though, we primarily work with health staff/physicians, healthcare systems, payers, hospitals, and clinics.

- *Appendices Overview:*

  The attached appendices A, B, and C should be considered references to the required data elements of the tool, but is not to be considered an exhaustive list.

  - Appendix A – PIMS Definition Document:
    TRCs have different ways of collecting and inputting data. This document is an internal guide to standardize data definitions and enter data into our federal PIMS report. It is divided into two parts: 1) Guiding principles – Informs TRCs how to input data 2) Definitions – Explains how to sort core data into simple categories.
  - Appendix B – Conceptual Model – TRC Services and Activities:
    The conceptual model provides a breakdown of the following core TRC data:
    - Technical Assistance
    - Outreach
    - Administration

    The purpose of the conceptual model is to provide a minimum dataset for collection.
  - Appendix C – Conceptual Model and PIMS Crosswalk:
    The table in this section reflects how our collected data results from the proposed data tool should translate to match PIMS' entry fields.

II. General Information and RFP Schedule

1. Bidder's Conference

A Bidder's conference will be held:

DATE: Tuesday, March 12th, 2019

TIME: 1:00 p.m. to 2:00 p.m., (PT)

PLACE: https://zoom.us/j/715919598

The purpose of the Bidder's Conference is to provide an opportunity for potential proposers to raise questions pertaining to the development of their proposals. It is not the intent of this conference to offer personalized technical assistance, but rather to provide examples, clarify information or answer questions relevant to this RFP.

2. Right to Terminate RFP

The NCTRC reserves the right to terminate this Request for Proposals and all documents associated with the Request for Proposals at its sole discretion at any time, with or without cause, upon written notice to the other party. In the event of termination, notice shall be deemed served on the date of mailing and shall be effective immediately. NCTRC shall not be responsible for any costs to proposer prior to termination.

3. Ambiguity - Conflict or Other Errors in RFP

If a candidate discovers any ambiguity, conflict, discrepancy, omission or other errors in the RFP after the bidder's conference, the proposer shall immediately notify the NCTRC contacts of such error in writing and request modification or clarification of the document.

If a proposer fails to notify the NCTRC prior to the date and time fixed for submission of proposals of an error, or an error that reasonably should have been known, the proposal shall be submitted at the proposer's own risk. If selected, the proposer shall not be entitled to additional compensation or time by reason of the error or its later correction.

The NCTRC may also modify the RFP, prior to the date and time fixed for submission of proposals, by issuance of a revision to all parties who have received the RFP.

4. RFP Schedule

Release of RFP:	Wednesday, March 6th, 2019
Bidder's Conference:	Tuesday, March 12th, 2019 (1:00 PM – PT)
Proposals Due (see Section V for details):	Friday, March 29th, 2019 (4:00 PM – PT)
Interview Period:	April 18th – 19th and April 22nd – 23rd
Bidder Selection Date:	Wednesday, April 24th, 2019
Project Completion Deadline:	Friday, August 30th, 2019

5. Submission Instructions

Proposals must be submitted via email in PDF format to Kris Erps (kerps@telemedicine.arizona.edu) by **4:00 PM (PT) on Friday, March 29th, 2019.** Late proposals will not be accepted or considered.

III. **<u>Project Scope</u>**

Project Description:

In the short-term, the goal is to establish an organized data tool that accurately automates and sorts elements of data input. The data tool will be used to record and store data while running accurate calculations to be extracted and transferred into our federal funder's reporting tool "*Performance Improvement Measurement System*" (PIMS). Some key functions the tool should be able to perform include importing data from external documents (such as .csv) to the data tool, track and record with accuracy, and produce concise quality reports. We expect the tool's functionality to evolve as the NCTRC continues to define itself. The tool will need to be positioned to evolve and grow with minimal disruption and cost over the next one to two years.

ESSENTIAL ELEMENTS

1. **Data collection (see Appx. A for data reference):**
   The system is required to collect data for the following information categories:
   1. <u>Contacts</u>: person or organization that initiated a contact with a TRC to start a consultation i.e. Name, Organization, Organization Type, etc.
   2. <u>Technical Assistance</u>: a request for a Technical Assistance by a potential "contact" i.e. Method of delivery via email, phone call, request form, etc.
   3. <u>Outreach Efforts</u>: an activity initiated by TRC or upon request from a Technical Assistance task. i.e. Outreach activities such as conference attendance, exhibiting, presentations, etc.
   4. <u>Administrative Tasks</u>: an activity initiated by the TRC that falls within professional development or administrative aspects.

   Note 1: It is important that the design allows for easy implementation of any new data elements that need to be collected to either be included in future updates, or to expand on the initial database design.

   Note 2: In general, each TRC will have access to its own data without having access to all other TRC's data. A few exceptions may apply to some data elements, including but not limited to contacts and metadata (reference Appendix B).

   Note 3: The data input forms should have auto-fill and skip logic functionalities.

2. **CRM tool:**
   The system should be adapted to the workflow of the TRC and be able to:
   - Link a request to the appropriate Contact(s)
   - Assign a request to appropriate TRC staff
   - Roll up different requests under the same contact(s)
   - Add/Remove contacts to a request as needed
   - Close the requests
   - Option to send satisfaction surveys to contacts

3. **Dashboards and reporting:**
   The system should be able to:

- Offer full and dynamic access to the data
- Capacity to export the data in different formats (i.e: CSV, Excel Spreadsheet, PDF)
- Search and filter based on all data elements
- Clearly display all the data points being collected in the system
- Setup PDF reports for regular reports
- Parse unstructured data from free data entry or email content
- Pull reports for each TRC individually (note: there are 14 TRCs nationwide and one Consortium lead)
- Aggregate reports and benchmark data from across all 14 TRCs and for the Consortium lead
- Auto-fill function for regularly referenced documents & organizations
- Allow for system admin to make modifications

4. **Design & Functionality:**

   The final product must be:
   - Web-based with independently manageable subdirectories/pages for each of the individual 14 TRC's and the NCTRC project coordinator via login portal.
   - Capable of indexing previous contacts and regularly referenced documents to create an auto-fill function.
   - SSL Encryption for logins
   - Well organized and intuitive to use with a simple interface.
   - Created with a responsive design allowing data entry from multiple devices, i.e. tablets, phones, laptops, etc.
   - Quick to load and operate

5. **Maintenance and Hosting:**

   Candidates must submit a plan for a standard level of maintenance, response to technical assistance, explore server and data housing service options of where the system and data may be housed, and cost estimates for 1-year.

6. **Training:**

   Proposals must include a one-month training period which will allow for the NCTRC to assess quality and address additional concerns of the final product. Please include a generalized training plan that will allow for the training of all 14 TRC's.

IV. **Budget and Proposal Requirements**

1. Please include comprehensive cost estimate plans in the range of $30,000. Costs exceeding $30,000 will be carefully evaluated based on added value.

2. Briefly describe a time your company has provided this type of service.

3. Maintenance and Hosting: Candidates must submit a plan for a standard level of maintenance, response to technical assistance, explore server and data housing service options of where the system and data may be housed, and cost estimates for 1-year.

4. Provide an implementation timeline for your proposed service and proposed costs.

5. Indicate payment and invoicing structure.

6. Describe your organization's recent experience in providing the proposed services.

7. References & Samples **–** Please list 3 complete references from organizations/agencies that the applicant has had direct involvement with. The following information for each reference must include:

   - **Organization Name**
   - **Address & Phone Number**
   - **Contact Person**
   - **Description of Services Provided**

8. Please include one sample product from a previous project similar to this RFP request.

V. Proposal Development, Submission Requirements, and Submission Instructions

- **Response Format** – Each proposal shall conform and be responsive to the NCTRC specifications. Proposer shall furnish complete specifications, provide rates for all services requested, and provide pricing for all equipment and parts solicited under this RFP.

- **Proposal Deadline -** Proposals must be submitted via email in PDF format to Kris Erps (kerps@telemedicine.arizona.edu) by **4:00 PM (PT) on Friday, March 29th, 2019.** Late proposals will not be accepted or considered.

- **All Costs Included** - All costs and plan estimates must be included in the proposal.

- **Contract Term** – Date of signed contract through 8/30/19.

VI. Additional Requirements/Conditions:

- **Implied Requirements** - Products and services not specifically mentioned in this RFP, but which are necessary to provide the functional capabilities described by the proposer, shall be included in the proposal.

- **Resources Used** – The NCTRC would prefer an open source software in full acknowledgement that it may not be the optimal option. If proprietary software/code is used, the selected vendor must fully disclose this information.

VII. **EVALUATION AND SELECTION PROCESS**

I. **Proposal Evaluation**

Each response will be reviewed prior to the selection process for completeness. A response will be considered complete if all requested sections are included in the proper order and properly completed.

A successful proposal should be able to demonstrate the ability to meet the scope of work. All proposals must include the information requested:

- Required responses indicated in the Proposal Requirements section
- Comprehensive cost estimate plans
- Maintenance, hosting, and server plan
- 3 professional references
- 1 sample product

Failure to submit the required information could lead to the rejection of the proposal.

II. **Evaluation Criteria**

Each proposal will be scored on responses to the following areas:

- Vendor cost and value of cost estimate plans
- Maintenance, hosting, and server plan
- Extent of experience
- Sample product
- Quote preparation, thoroughness, and responsiveness to the RFP requirement

The successful proposer will be chosen based upon best value.

Right of Rejection – The NCTRC reserves the right to reject any or all proposals, or any or all items of any proposal. The NCTRC also retains exclusive discretion to determine:

- Whether a proposal is responsive and conforms to the provisions of the RFP
- Whether a proposer should be allowed to submit supplemental information
- Whether a proposer will be interviewed

APPENDIX A – PIMS Definitions Document

1. Guiding Principles

A. Unanimous agreement that TRCs will use TA (Technical Assistance) and Outreach as our key metrics.

1) TA is requested (they come to us).
2) Outreach is anything else that we do (we go to them).

B. "Parsing method" is applied when a series of events follows after an encounter.

1) Example: TA request (1 = TA) becomes an invitation to speak at a conference (2 = outreach). That conference includes a small training session (3 = outreach), which leads to breakout groups led by a TRC (4 = outreach).
2) The series in the example above can be broken into 4 separate categories, all of which will be counted in PIMS.

2. Definitions

A. TA Individual Contact

Definition: Individual(s) or organization contacts the TRC and requests something (does not have to be a specific question) via any method (e.g., email, website, phone, text, in-person).

1) The request must have at a minimum: individual/organization name, date/time, state and email and/or phone number.
2) Other relevant information that should be collected as feasible but are not required are: city, address, organizational affiliation.
3) Extended conversations (> 5 minutes) at conferences/meetings are considered in-person TA as long as relevant contact information is collected.
4) Conversations without acquiring contact information are not considered individual contact TA.

B. Outreach

Definition: Everything initiated by a TRC that is not TA - Did we present, did we exhibit, did we attend?

1) Conference = Event organized and hosted by a TRC, group of TRCs or TRC- related entity (e.g., HRSA) that is open to more than a single individual or organization requesting TRC services for the purpose of outreach or exhibiting at such an event.
2) Meeting = Event organized and hosted by a TRC, related entity (e.g., HRSA) or event organized and hosted by a TRC customer for the purpose of TA.
3) Mass Communication: Activities like website social media, toolkits, etc. that are generally asynchronous in nature.
4) Presentations and Training: Synchronous, can be virtual (webinar or video) or in person. TRC can be either host or presenter.

C. Administrative

Definition: Activity or event initiated by a TRC related to administrative or professional development.

1) Minimum data set includes:
    a) Activity type
    b) Date

APPENDIX B – Conceptual Model – TRC Services and Activities

Technical Assistance (TA)

- Initiated by a contact
- Information about contact is collected
- Minimum data set about contact(s):
  - Name(s)
  - Email(s) or phone #(s)
  - State
  - Organization/ Organization Type
- Minimum data set about TRC response:
  - Date and method of inquiry
  - Date and method of response
  - Number of recipients
  - Topic(s) of inquiry
  - Total direct and indirect hours of service provided
  - Materials distributed

Outreach

- Activity initiated by TRC OR as a response to a TA request
- Activity is delivered to an audience where contact information about each individual participant may or may not be collected/known
- Minimum data set:
  - Activity type
  - See specific activity type for activity specific data

Administration

- Initiated by TRC
- Activity/event is related to administrative or professional development
- Minimum data set:
  a. Activity type
  b. Date

APPENDIX B – Conceptual Model – TRC Services and Activities (Cont.)

Technical Assistance

Level 1

- Brief response, minimal time and effort required (total time to provide response is under 30 minutes)
- Method of response varies (e.g., email, phone call, chat, online discussion board, videoconference, social media messaging)
- Minimal research or other indirect activity time required
- No or minimal expense involved (e.g., postage)

Level 2

- Moderate level of time and effort required (total time to provide response exceeds 30 minutes but is under 10 hours)
- Method of response varies, but leans toward the more interactive (phone call, videoconference, meeting)
- Moderate research or other indirect time required
- May involve some minimal to moderate expenses (e.g., materials, printing, travel, hosting costs)

Level 3

- Intensive level of time and effort required (total time to provide response exceeds 10 hours
- Does not involve contracted services or fee for service activities
- Extensive research or other indirect time required
- May involve some moderate to high expenses (e.g., design, graphics, materials, printing, travel)

Level 4

- Intensive level of time and effort required (total time to provide response exceeds 10 hours)
- Involves contracted services or fee for service activities
- Extensive research or other indirect time required
- May involve some moderate to high expenses (e.g., design, graphics, materials, printing, travel)

APPENDIX B – Conceptual Model – TRC Services and Activities (Cont.)

Outreach

SYNCH | ASYNC

Individual Outreach

- Minimum data set:
  - Date(s)
  - Name(s)
  - Email(s) or phone #(s)
  - State
  - Organization/ Organization Type

Conferences

- Exhibit
- Host
- Minimum data set:
  - Date(s)
  - Number of attendees or recipients
  - Total direct and indirect hours of activity/event provided
  - Name of Conference
  - City and State

Meetings

- Attendee: Meetings you attend to provide a TRC presence and/or to ensure that meeting attendees are accurate in their understanding about telehealth. You don't have a specific role and may or may not have been specifically invited to attend.
- Organizer/Host: Meetings you initiate to facilitate partnerships, strategic planning, grant development activities, etc.
- Minimum data set:
  - Date(s)
  - Number of attendees or recipients
  - Total direct and indirect hours of activity/event provided

Presentations and Trainings

- Type
  - Virtual (e.g. Webinar/Video)
  - In Person
- Role
  - Host
  - Presenter Only
- Minimum data set:
  - Date(s)
  - Number of attendees or recipients
  - Total direct and indirect hours of activity/event provided

Mass Communications

- Website
  - Number of hits
- Social Media
  - Number of posts
- Newsletters
  - Number created
  - Number of recipients
- Materials (Toolkits, Fact Sheets)
  - Type and number developed
- Training modules/recorded trainings
  - Number created
  - Number of views/downloads
- Other Media/ Publications
  - Type and Number (e.g., posters, papers, newspaper articles, podcasts, blog posts, interviews, etc.)

APPENDIX B – Conceptual Model – TRC Services and Activities (Cont.)

Administration

- Activity Type
  - Grants management and reporting (PIMS, Progress Reports, Continuations Proposals)
  - Fiscal and contract management
  - Staff oversight/supervision
  - Administrative/staff meetings
  - Professional development/training activities (includes internal trainings, conference attendance with no other specific role)
  - Advisory Board/Steering/Planning Committee Meetings
  - TRC Strategic Planning Meetings
  - PI/Consortium Meetings
- Minimum data set:
  - Date(s)
  - Total hours

APPENDIX C – Conceptual Model and PIMS Crosswalk

Conceptual Model	PIMS (by reporting period)
Service Utilization by State and Type of Organization Requesting Services	
• Technical Assistance	• Total number of clients served • Total number of repeat clients
	Direct
• Presentations and Trainings	• Total number of clients served via training
	List each state in your region and total number of clients served in each
• Technical Assistance • Outreach: Conferences, Meetings, Presentations and Trainings	• Number of clients served via consultation by State • Number of clients via conference, meeting or training by State
	Indirect
• Outreach: Conferences, Meetings, Presentations and Trainings	• Total number of clients served via education and outreach
Organization Requesting Service	
• Technical Assistance	• Number of contacts requesting technical assistance by organization type
TRC Technical Assistance Communication Method of Inquiry and Response	
• Technical Assistance	• Method of Technical Assistance Inquiry • Method Used to Respond to Inquiries • Topic of Inquiry (number by category)
Training/Education and Outreach	
• Outreach: Conferences, Meetings - Host • Outreach: Presentations and Trainings – In-Person - Presenter Only	Number of Conferences/Meetings • Total # of conferences/meetings hosted by TRC • Total number of participants • Total number of TRC presentations at conferences/meetings
• Outreach: Presentations and Trainings –In-Person - Host	Number of Trainings • Total number of trainings hosted by TRC • Total number of participants
• Outreach: Presentations and Trainings – Virtual - Host and Presenter Only	Number of Webinars • Total number of webinars hosted by TRC • Total number of participants • Total number requested by HRSA • Total number requested by other Federal Agency
Not Captured Elsewhere Outreach: Meetings – Attendee	Other o Number of Other
Communications/Promotional Activities	

Outreach: Conferences – Exhibit Outreach: Mass Communications – Other Media/Publications	Exhibit booths at conferences • Number of booths • Number of contacts • Number of hours managing exhibit General Media • Number of interviews • Number of articles
Tools/Materials/Resources	
Outreach: Mass Communications • Newsletters • Website • Materials • Training modules/recorded trainings • Other Media/Publications	Newsletter • Number of newsletters • Number of subscribers Website • Number of visits Fact Sheets/One Pagers • Number of fact sheets/one pagers Online Education • Number of video modules • Number of views of video modules • Number of toolkits • Number of views per toolkit • Number of course modules • Number of people accessing course modules • Number of issue briefs • Other