NOSORH
national organization of state offices of rural health

REQUEST FOR PROPOSALS

Web-based Performance Measures Tracking Tool Price Agreement for SORH

DATE OF RELEASE: September 29, 2010

SECTION 1: BACKGROUND & SUMMARY OF PROPOSED WORK: The National Organization of State Offices of Rural Health (NOSORH) is the membership association of all fifty state offices of rural health (SORH). NOSORH is dedicated to promoting the capacity of SORH through leadership development, advocacy, education, and partnerships. For more information about NOSORH and the 50 state offices of rural health go to nosorh.org.

NOSORH recognizes that in order to effectively accomplish its mission, NOSORH must be able to define, document, collect and articulate the impact of SORHs and their services through a focused and succinct set of SORH performance measures. NOSORH seeks a qualified contractor to provide a web-based data collection tool for these measures. The services specifically sought include:

1. *Web-based data collection system*
2. *Implementation, training and continuing education*
3. *Ongoing maintenance of the web-based data collection system*

It is important to note that the 50 SORHs have differing organizational structure, and each has unique capacity for adopting and utilizing a web-based performance tool and challenges for contracting for services. Attachments A and B provide more background on prior work of SORH and NOSORH regarding performance measures. This wide variety of activities, requirements and available resources is a key challenge of the proposed work.

The selected Contractor will negotiate an annual price agreement with NOSORH for a uniform, but customizable, performance measurement tool for adoption by all 50 SORH.

Ideally NOSORH and the selected Contractor will work together to be able to offer all 50 SORH a basic performance measures tool which will collect data on 5 core measures of performance and at least 10 custom measures. Depending on project costs, NOSORH may establish a price agreement for all SORH which will include special pricing for the use of the tool, training, custom measures, ongoing maintenance of the system. NOSORH predicts that this can be offered as an ongoing service. NOSORH will serve as a focal point for:

- offering the tool to all 50 SORH regardless of their current capacity
- ensuring SORH are current with federal requirements
- eliminating any duplicate reporting requirements
- streamlined implementation of the tool
- testing of the tool for all 50 SORH

The Contractor will be responsible for developing or adopting a web-based tool to collect data on SORH activities, implementation of the tool, education and ongoing support and maintenance to support the data collection of a minimum of five core measures; it is preferred that the selected system will allow for customization by each SORH, including additional, multiple, state-selected measures for each SORH. These state-selected measures may originate from activities unique to each state or may include measures from other federal programs. It is expected that the system will service all 50 SORHs and their staff.

SECTION 2: PROJECT FUNDING: Funding for this project is available from the date of this RFP through August 31, 2011. Ongoing funding is expected through at least 2012. The services to be provided by this Contractor will be funded in part by a Cooperative Agreement from the Federal Office of Rural Health Policy (ORHP) and are subject to all terms and conditions of that Agreement. Other funding may be provided by fees collected from enrolled SORH. The development of a contracting and pricing strategy which may allow for some revenue sharing will be key to the strategy for this project.

SECTION 3: REQUIRED LETTER OF INTEREST AND PRE-BID TELE-CONFERENCE: Notice of interest to bid on this project is required. Please register for the tele-conference and submit any questions or comments regarding the RFP in advance to Donna Pfaendtner, Administrative Coordinator donnap@nosorh.org. Registration for the teleconference and questions or comments are due no later than Monday, October 4th, 5 PM Eastern. The pre-bid tele-conference call will be held Tuesday, October 5th at 3 PM eastern. Bidders must register for the tele-conference to obtain dial-in instructions. The tele-conference will be recorded for future playback at the bidders' request.

SECTION 4: SUBMISSION OF PROPOSALS AND AWARD DATE: Interested contractors shall submit a proposal via email by October 29, 2010 to: donnap@nosorh.org. A written copy of the signed proposal is to be postmarked to the letterhead address no later than October 29, 2010. Proposals must include the proposal cover sheet with the format outlined in the attached document. Proposal should not exceed 25 single-spaced pages including all attachments. NOSORH anticipates an award date no later than January 1, 2011 and the ability to start using a web-based tools within at least six weeks after award.

SECTION 5: SCOPE OF WORK: The ultimate goal of this project is that all 50 SORH will input data into the web-based data collection tool in order to capture the overall impact of the wide range of work of SORH. Nearly all work on the project will be done "electronically" through tele-conference, email, webinar, and use of web-based workspaces. There are some opportunities to meet face to face with SORH at national and regional meetings, as needed.

In addition to the roles described in Section 1, NOSORH staff and the Performance Measures Committee will be integrally involved in the development of the project by advising the Contractor.

The web-based tool developed for this project will be used in three general ways.

a) by individual SORH staff to track and report their activities and impact of their work;
b) by NOSORH to compile and report the collective impact of all SORH work; and
c) by NOSORH to compile and report the impact of the organization to funders, policy makers, SORHs or their partners.

NOSORH Expectations for the Basic Web-Based Tool:

1. The tool must be linked from the NOSORH website, and labeled with the NOSORH "brand."
2. The system must have the capacity to handle a large number of users simultaneously without delay and reporting must be available on a real time basis for a large number of users simultaneously without delay. Each state may have multiple users, ranging up to 30 with an average size of 4, who must be accommodated by the system.
3. The system must provide for security, back up and retrieval of lost data for each user.
4. A diverse selection of reports must be available with comparative features such as:

a) allowing for NOSORH and individual SORH report customization which allows users to select, compile and report a variety of data;
b) capability to compile data required for PIMS reporting and produce "PIMS-ready" report for quick and easy entry into DHHS PIMS, capacity to track trends;
c) within an individual SORH for use among staff, contractors or programs;
d) between SORH on a variety performance measures;
e) cumulative calculation of interval data entry also referred to as “one touch roll up” data entry;
f) capacity to develop customized reports; and
g) ability to produce narrative, list, graph, chart and mapping reports, and to export data into spreadsheet or database programs for further manipulation.

5. Ease of use which allows for simple user registration, validity checks, clear definitions and examples of all measures, and includes a staff tutorial for new staff.
6. Immediate Data entry which allows up to 500 users across the nation to input data at any given time, with no limit on the number of entry users. The tool should have a field for narrative comments for open-ended data entry so that a description of the encounter can be included.

Expected Roles, Responsibilities, Timeline and Resources

The NOSORH Performance Measures committee and NOSORH staff will serve as a focus group and/or facilitate the engaging of key stakeholders from the state and national level, including ORHP.

The successful bidder will present a detailed timeline for the implementation of the web-based data collection tool with their proposal. The following general timeline describes some initial thinking on the potential project phases and some proposed expectations of roles and responsibilities of the contractor, the NOSORH Performance Measures Committee and staff, and the SORH. It is expected that the NOSORH Performance Measures Committee will meet by tele-conference at least monthly for no more than one hour for regular progress updates with the contractor. The Committee will play a key role in advising the project, including testing of the initial tool, engaging SORH to adopt the tool, and making suggestions for improvement.

Activity	Responsibility	Expected Date of Completion
PHASE 1 – Testing and Roll Out Tool for SORH Review and Consideration		
Notification to the membership of the availability of the tool and the implementation phase	NOSORH staff & Committee	Within 1 week of award
Testing and refinement of the basic web-based tool for collecting the 5 Core measures	Contractor & PM Committee	Within 4 weeks of award
Final testing, review of initial users manual and data dictionary	Contractor & PM Committee	Within 6 weeks of award
Link tool, manual and data dictionary to NOSORH website	NOSORH staff, website Contractor & PM Contractor	Within 6 weeks of award
Develop and approve a strategy and pricing structure for enrollment of SORH	NOSORH staff, PM Contractor, Board	Within 6 weeks of award
General orientation webinar for all 50 SORH	NOSORH staff, PM Committee & Contractor	Within 7 weeks of award
PHASE 2 – Enrollment and Training of SORH		
“Enrollment” of SORH – goal at least 35 SORH enroll to use the tool in the first year	NOSORH staff, PM Committee & Contractor	Within 9 weeks of award
General, individualized training webinar for all enrolled SORH on basic tool by webinar	NOSORH staff, PM Committee, Contractor & SORH	Within 12 weeks of award
Schedule and conduct training for all enrolled SORH	Contractor and enrolled SORH	Within 16 weeks of award
Trained SORH input data	Enrolled SORH	Within 20 weeks of award

PHASE 3 – Review and Revise		
Review and correction of initial data by enrolled SORH	NOSORH PM, Contractor and SORH	Within 24 weeks of award
Initial review of collective impact and customization needs	NOSORH staff, PM Committee & Contractor	Within 26 weeks of award
Notification to all enrollees of customized features in use and available - webinar	Contractor and NOSORH Staff, PM Committee	Within 28 weeks of award
PHASE 4 – Final Revision and Implementation		
Implementation and training required for wider adoption of selected customizations	Contractor and SORH	Within in 30 weeks of award
Data input	Enrolled SORH	Within 42 weeks of award
Second review and correction of data enrolled by SORH	NOSORH PM Committee and Staff	Within 44 weeks of award
Second review of collective impact report of SORH	Contractor, NOSORH Staff and PM Committee	Within 46 weeks of award
Strategize ongoing measuring of SORH impact	Contractor, NOSORH Staff & PM Committee	Prior to completion of the project.

Other Expectations

NOSORH expects a long-term relationship with the successful Contractor. It is expected that if the first year of the project is successful, all 50 SORH will ultimately engage in the utilization of a web-based tool into perpetuity.

The success of the project will be measured by SORH and NOSORH utilization and satisfaction, capacity to demonstrate the impact of individual SORH and the collective impact of SORH, and future funding for support of the web-based tool.

NOSORH expects that all data collected by the web-based tool will be the property of NOSORH and its members.

NOSORH expects that there may be requests for customization of the basic tool for utilization by individual SORH. For example, a SORH may want to have the capacity to measure the impact of a state grant program to promote healthy lifestyle in rural communities. The selected system must allow for the customization by each SORH, within reasonable limits, including the addition of at least 10 additional, multiple, state-selected measures by each SORH. State-selected measures may originate from activities unique to each state or may include measures from other federal programs.

The Contractor shall control any requests for customization which could potentially undermine the project goal to measure the collective impact of all SORH. The Contractor should expect to report on customization in order to inform future efforts to measure the collective impact of the SORH.

SECTION 6: PROPOSAL CONTENT AND REVIEW CRITERIA: Proposals should be written and organized according to each of these review criteria. Review criteria are listed below. Please use the cover sheet format provided in Attachment C.

NOSORH may schedule individual tele-conferences or meetings to review the merits of any or all submitted proposals. NOSORH will utilize a confidential review team to compare proposals and recommend a Contractor to the NOSORH Board of Directors.

35 points – Proposed Web-based Tool – Provide a complete description of the elements of the proposed web-based tool. Include information regarding whether a new tool is being developed specifically for NOSORH or whether an existing tool will be customized to meet NOSORH needs. Describe the sample data elements recommended to allow for reporting and other needs as described in Attachment B.

Descriptions of the user log-in and verification process, security, backup, capacity to link with the NOSORH website, examples of reports that can be generated, sample “screen shots” if possible, and any other description which allows reviewers to understand the tool proposed. If an existing tool will be customized to meet NOSORH needs please describe the existing tool and expected necessary modifications and timeline required for completion.

20 points – Staffing – Support– Provide a thorough description of your organization’s capacity to support this project. Describe how you expect to staff and support the project throughout all phases of activity, including development of the tool, training, support, troubleshooting, and engagement with the NOSORH Performance Measures Committee, other key stakeholders, reporting, and any other support required to ensure project success. Provide the name, contact information and a summary of the expertise of all key and support staff, including but not limited to their role for the project, their academic credentials and relevant experience working with SORH, state, non-profit or membership associations. Provide CVs and expected FTE or hours for all named staff who may potentially be assigned to the project.

25 points - Methodology & Timeline – Propose a methodology and timeline for the activities, using the expectations outlined in this RFP as a basic format. Add additional key deliverables and benchmarks in order to provide a rich description of all proposed project activities including quarterly reports to NOSORH on SORH utilization of the tool. The methodology for establishing a strategy for enrollment and contracting with SORH is a critical component of this timeline. Provide a thorough description of the plan for training SORH on the use of the web-based tool. Please provide an overview of the background, time commitment or other expectations of identified users. Identify specific benchmarks for each activity and responsibilities of NOSORH, of the Contractor, or others. The estimated contract start date is January 2011. Current project funding expires August 31, 2011 and is expected to be renewed as noted in the Section 5 “Expected Timeline”.

15 points - Proposed Budget – Basic elements of the proposed budget should be outlined and summarized as specified in the format displayed in Attachment D. Provide a summary of deliverables, with expected date of completion and requested payment schedule. Include a narrative description of all costs. No indirect costs are allowed. No funding should be requested for travel, group conference calls, online surveys or postage.

5 points - List of References – Provide contact information for at least three reference organizations for which you have completed similar or relevant work including specific contact names, and website addresses. Samples of work performed for these reference organizations may be requested.

ATTACHMENT A – STATE OF PERFORMANCE MEASURE ACTIVITY BY SORHS

NOSORH has been engaged in planning for measuring the impact of SORH for at least the past 3 years. This work has included the study and identification of promising practices of SORH, assisting ORHP in identifying appropriate reporting requirements for the federal SORH state grant program, and the identification and testing of data collection for five potential measures of SORH impact. Reports of these activities are available upon request. Please contact Donna Pfaendtner, Administrative Coordinator donnap@nosorh.org to receive any copy of these reports.

This project is built on the prior work to identify and test data collection on the appropriate measures. SORHs utilize a wide range of data collection and evaluation monitoring techniques which may provide a model for the work requested.

In the last eighteen months SORHs have specifically expressed interest in a project to capture this data; however there are no mandatory reporting requirements for the SORH to report data beyond the required federal PIMS data. Participation in this effort at this time will be voluntary. Currently, SORH are required to report number of technical assistance contacts to communities annually through the PIMS system.

ORHP has developed a data collection tool called the Performance Improvement Measurement System (PIMS). PIMS is integrated with the HRSA Electronic Handbook (EHB), the same website used by SORHs to submit non-competitive continuation applications. The interface was completed early in calendar year 2009 and was used to collect FY 08 and FY 09 SORH performance measurement data. SORH and other ORHP grantees will use PIMS to track their OMB approved grant specific performance measures. ORHP will use PIMS data to generate program reports that will help improve SORH, respond to external inquiries about SORH, and help demonstrate the impact of SORH.

SURVEY OF SORH

During the last year, NOSORH has conducted surveys of SORH regarding their use, needs and interest in Performance Measures Tools. A simple summary of the survey results follows. The response rate for the surveys was approximately 52% of SORH. The wide range of needs and expectations of SORH regarding performance measures reporting are reflected in the summary.

23% of respondent SORH report that they use a web-based data collection tool

What tool does your office use to collect performance data?

Excel -46% of respondent SORH
Custom developed system recommended by another SORH – 3
Other:

- We use access
- We are transitioning to a new database where we hope to be able to capture this data
- Monthly reports, individuals' notes and calendars We use a clipboard and a log our office developed
- Oracle Database
- RPM One that we have developed using a FileMaker Pro platform
- Custom developed system,
- Our staff uses some paper records and some computer. We turn all into and ACCESS data base for our annual reports.
- Survey of staff

How much did you pay for your data collection tool?

- 50% respondent SORH do not pay for their data collection tool
- 8% pay $5,000 - $10,000
- 4% pay $10-$15,000
- 3% pay more than $15,000

Are there ongoing costs related to the use of your data collection tool?

- Only 1 SORH reported ongoing costs beyond staff

What features do you find most helpful about your system?

- Simple, easy to use. Staff objects to anything that is complicated and takes lots of time to enter information
- It is tied to contracts, and we can filter by funding cycle or by specific period without regard to funding year
- Central repository of data and uniform system for all staff
- The ability to map our data with GIS tools, allowing us to generate very specific maps of our work. Also graphic, real-time charts of the data being tracked
- Nothing

Please describe your interest in NOSORH developing a web-based reporting tool for measuring overall SORH impact.

- 29% Might be interest if measures are meaningful, tool is easy to use, doesn't duplicate required reporting and requires no additional investment by our SORH
- 33% definitely interested and willing to consider a small budget for the right tool

ATTACHMENT B – MEASURES

NOSORH expects that the basic tool to be provided by the Contractor will allow for collection of "NOSORH defined measures" and the required PIMS data as described below, with no duplication of effort on the part of the SORH. NOSORH will work to finalize all measures before the initial testing of the contracted tool.

A. Description of the Basic Measures to be included in the NOSORH "basic tool"

Information Dissemination

Description: Measures the number information dissemination and communication activities
Definition: Number of information dissemination and communication activities
Units: Number
Interpretation: Higher value reflects greater information dissemination
Frequency: as appropriate
Example 1: One newsletter sent to 500 rural stakeholders – Counted as 1 information dissemination event.
Example 2: The SORH Director presents on rural health policy issue at the state rural health association annual meeting. Two hundred attendees attend the presentation – Counted as 1 information dissemination event.

Dollars Leveraging

Description: Measures the success of the SORH in accessing additional sources of funding to pursue its goals (e.g., these are funds generated by proposals submitted directly by the SORH or for which the SORH actively participated in the grant application and received funds from the award). Other dollar leveraging activity is reported under technical assistance. This is measured as a total of dollars received from other funding sources.
Definition: Total new grant dollars received by SORH.
Units: Dollars
Interpretation: Higher value reflects greater success in generating funds to carryout activities of the SORH. (It does not measure the return on investment.)
Frequency: upon award
Example 1: SORH requests $25,000 through a CDC grant. The award received directly by the SORH for the application is counted as dollars leveraged.

Policy Related Activities

Description: Measures the number of individuals engaged in SORH policy related activities
Definition: Number of individuals engaged
Units: Number
Interpretation Higher value reflects greater number of individual policy related contacts
Perspective: SORH
Frequency: as appropriate
Example 1: SORH Director attended National Rural Health Association Policy Institute and spoke to two Congressman and one senator about his/her state's rural health issues – Counted as three policy related activities.
Example 2: SORH Director attended a state rural health clinic association meeting and discussed changes to the designation area criteria. Sixty RHC representatives attended the presentation – Counted as 1 policy related contact.

Recruitment/Retention Efforts

Description: Measures individual contacts related to recruitment/retention efforts and/or support
Definition: Number of individuals contacted or participating in recruitment/retention efforts and/or support activities
Units: Number
Interpretation: Higher value reflects greater number of recruitment/retention contacts
Frequency: as appropriate
Example 1: SORH staff member conducts an assessment of 15 hospitals' needs for recruitment of primary care practitioners and posts 12 opportunities on the 3RNet website. Counted as 15 recruitment efforts
Example 2: SORH Director is contacted by five physicians seeking to practice in rural areas in his/her state. SORH Director sent contact information for local health care providers and loan repayment programs to the physicians - Counted as five recruitment/retention contacts.

Technical Assistance

Description: Measures the number of individuals reached through technical assistance activities
Definition: Number of individuals reached through technical assistance activities
Units: Number
Interpretation: Higher value reflects greater number of individuals reached
Perspective: SORH
Frequency: as appropriate
Example 1: SORH staff conducted a conference call for rural providers to discuss the availability of federal grant dollars to support rural activities. Twelve people representing 4 unduplicated organizations/communities participated on the call – Counted as four technical assistance activities.
Example 2: SORH staff provides technical assistance to a group of three physicians seeking to develop a Rural Health Clinic in Tinytown, Indiana- Counted as 1 individual contact.

B. Description of Measures as required by the Federal PIMS Performance Measure Reporting

SORHs are required to enter annual performance measurement data *directly into PIMS* no later than 30 days after the end of each budget period. These measures are to be captured in the basic tool to be provided by NOSORH.

1. Report the total number of technical assistance (TA) encounters provided *directly* to clients within your State by SORH. Provide a breakdown of different types of TA provided. Any type of TA not listed in EHB should be counted as "other".

2. Report the total number of clients (unduplicated) within your State that received technical assistance *directly* from SORH. Provide a breakdown of different types of clients that received TA. Any type of client not listed in EHB should be counted as "other".

Definitions for above:

<u>Technical Assistance (TA) Encounter</u>: Any activity that is planned, funded, organized, administered or provided by SORH that results in the delivery of substantive information, advice, education or training *directly* to a client (s). TA must be provided face to face, thru tele-conference/webinar technology or via *in-depth* telephone and e-mail interactions that result in the delivery of substantive service or subject content (problem solving, proposal feedback, regulation interpretation, grant application guidance etc.) to a client. Relatively brief/outline telephone and email responses and direct mass mailings are <u>not</u> considered TA for the purpose of this measure. A client usually requests TA or receives an invitation from SORH to participate

in scheduled/formal TA activities such as workshops, conferences, seminars, meeting or training sessions. TA encounters provided to the *same* client on different occasions shall still be counted as an individual encounter.

Client (unduplicated): Any individual, group or organization interested in rural health. Examples include but are not limited to: providers/technicians, hospitals, clinics, networks, agencies, associations, organizations, academic institutions, government officials, communities, partners and other stakeholders. Affiliated individuals (i.e., members of an association or organization) would normally be considered a *single* client. Example - SORH addressing State Rural Health Association about grant opportunities. Non-affiliated individuals (i.e., hospital administrators or nurses) would normally be considered as *multiple* clients. Example – hospital staff attending a SORH sponsored workshop on quality and performance improvement. A client may only be counted *once* regardless of how many times the client receives TA during the reporting period.

ATTACHMENT C

Please provide a cover sheet for the proposal in this format. A word document of this cover sheet will be provided to all bidders who have offered a letter of intent.

PROPOSAL COVER SHEET:

Proposal Title: ______________________________

Applicant: ______________________________

Address: ______________________________

City, State, Zip: ______________________________

Tax ID #: ______________________________

Contact Person: ______________________________

Phone Number: ______________ Email: ______________

Authorized Signature: ______________________________

Print Name: ______________________________

Title: ______________________________

ATTACHMENT D

Please use the format provided below to assist NOSORH to understand all elements of the costs for a potential price agreement for SORH Performance Measures. A word document of this cover sheet will be provided to all bidders who have offered a letter of intent.

Budget Summary	
Directions Please use the worksheet provided to provide the best calculation of total cost. Please document all underlying assumptions, which will ultimately impact the total cost of the project.	
YEAR 1 EXPECTED COST	
Expected elements of Proposed Budget	**Total Cost – Please describe all underlying assumptions – limitations to pricing**
Basic web-based tool for 5 core measures – including initial testing documentation, user orientation and log-in procedures developed, general orientation for all SORH, data dictionary and manual and tool linked to the NOSORH website	
Basic individual SORH training on use for every SORH and NOSORH on basic tool – cost per training session (if any) per SORH	
Hourly rate for additional training or support (if any) charges apply to additional training support and any applicable rate; describe how any additional charges may be incurred	
Price per custom measure (if any) to be added to the basic web tool, (describe underlying assumptions regarding number of data fields, hours or other factors which impact this expected cost), for the option of at least ten custom measures for their unique use	
Other	
YEAR 1 GRAND TOTAL – if all 50 SORH enroll	
YEAR 2 Expected Cost	
Basic tool for 5 core measures	
Maintenance and updates as needed	
Quarterly reporting on changes to the tool	
YEAR 2 GRANT TOTAL – if all 50 SORH stay enrolled	