

## APPENDIX N: COMPETITIVE PROCUREMENT SUBMISSION CONTENT

### PHASE 1 ADMINISTRATIVE REQUIREMENTS, MINIMUM MANDATORY QUALIFICATIONS, AND EXPERIENCE

Provide written responses to the requirements in this Phase as instructed in the section titled *Submission of Responses and Response Contents* of this CP.

#### ADMINISTRATIVE REQUIREMENTS RESPONSE

Bidder must respond to all Mandatory items in the Section titled ADMINISTRATIVE REQUIREMENTS

#### BIDDER MINIMUM MANDATORY QUALIFICATIONS

Bidder must respond to all of the following minimum qualifications:

#### MINIMUM MANDATORY QUALIFICATIONS (M)

Bidders must demonstrate in their Response that they meet the following minimum mandatory qualifications:

- Bidder must be comprised of a Lead Organization as the prime and a Data Vendor as a subcontractor.
- Additional subcontractors may also be included.
- The Lead Organization must be a non-profit or an academic institution.
- The Data Vendor must possess at least three (3) years of experience in implementing successful data systems similar in size and scope within the last five (5) years (such as data warehouse, Data Extract Transfer and Loads, data and systems security).
- For each project used to satisfy this qualification, the Bidder must provide a description of each of the Data Vendor's projects and include the project's client name (where possible), outcomes and length

#### I. BIDDER INFORMATION (M)

A. Provide the following information for the proposed Lead Organization:

1. Organization Name
2. Description of the organization, its mission and goals
3. Entity Formation
4. Identify the leadership staff of the Lead Organization by name and title

B. Provide the following information for the proposed Data Vendor and all additional Subcontractors

1. Organization Name
2. Description of the subcontractor organization, its mission and goals
3. Entity Formation
4. Identify the leadership staff of the subcontractor organization by name and title

## II. BIDDER EXPERIENCE (MS/BP)

Bidder must respond to each of the following requirements which will be scored:

- A. For the proposed organizations, please describe the experience requested below of the Lead Organization, Data Vendor and additional subcontractors, if applicable, clearly indicating which organization possesses the experience in each response. Three hundred (300) points will be allocated across the Experience requirements labeled (MS) and one hundred (100) bonus points will be allocated across the Experience Bonus requirements labeled (BP).
  1. (MS) Describe the Bidder's knowledge of the Washington state health care environment and policies.
  2. (MS) Describe the Bidder's experience in engaging claims and data suppliers.
  3. (BP) Describe the Bidder's experience in collecting health care data. Identify if this experience is with medical claims data.
  4. (MS) Describe the Bidder's experience in performing quality assurance for data.
  5. (MS) Describe the Bidder's experience in linking data to create longitudinal records
  6. (MS) Describe the Bidders experience in applying and ensuring HIPAA, and other state and federal privacy laws.
  7. (BP) Describe the Bidder's experience in securing health care data systems and health care data.
  8. (MS) Describe Bidder's experience developing de-identified data sets. Include any credentials or specific training acquired, name of Key Staff holding the credential or receiving the training, and the name of the credentialing or training organization.
  9. (BP) Describe Bidder's experience in successfully combining health care cost and quality data. Identify where in this experience established price and quality measures, such as HEDIS, NCQA or AHRQ, were used and where the Bidder created and used new measures.
  10. (BP) Describe the Bidder's experience in convening and effectively engaging stakeholders to develop reports.
  11. (BP) Describe Bidder's experience performing health care data analysis and analytics.
  12. (MS) Describe Bidder's experience developing data products from claims data. Include a brief description of the methodologies used in developing the data products. Provide examples or links to no more than 4 examples of the data products

## PHASE 2

### EXPLORE BIDDER'S APPROACH AND STRATEGIES

Bidders with the highest scoring experience from Phase 1 will be invited to Phase 2: Explore Bidder's Approach and Strategies. Points from Phase 1 do not pass to Phase 2. The CP Coordinator will notify participants of the date, time, and location of the Phase 2: Explore Bidder's Approach and Strategies. The dates in the Section titled *Estimated Schedule of Procurement Activities* of the CP are an estimate and are subject to change at the discretion of OFM.

By submitting a Response, the Bidder agrees to such recording and acknowledges and agrees that such recording will become an official part of their Response to OFM. Additionally, the Bidder understands and agrees that any assertions or commitments made verbally during these recorded events will be relied upon by OFM as accurate and binding and will be incorporated into the final contractual document between the parties unless expressly agreed otherwise by the parties. The Bidder further agrees to inform any and all of its employees, subcontractors or other participants it invites to partner that such recording will be done.

#### Format

In-person, all-day presentation in Olympia, WA

- Bidders will conduct three presentations led by three of Bidder's Key Staff (Lead Organization Lead, Data Vendor Lead, and Analytics/Data Products Lead).

#### Documentation (M)

Send electronic copies of the following documents to the OFM CP Coordinator by the required date in the *Section titled Estimated Schedule of Procurement Activities* of the CP:

- Final PowerPoint Presentation
  - Topics must be presented in the same order as the topics listed below for each presentation
- Final reference information (*Appendix I, Bidder Reference Form*)
- Key Resources Form (*Appendix H, Key Resources Form*)
- Final Resumes of Key Staff, including:
  - Lead Organization Lead
  - Data Vendor Lead
  - Analytics or Data Products Lead
  - Security Lead
  - Lead Organization Stakeholder/OFM Liaison (if identified)
- Draft of Sustainability Plan (*Appendix K, Sustainability Plan Template*)
- Draft SOW Activities Cost (*Appendix O, WA-APCD COST WORKSHEET*)
- Draft List of Contract Issue Items and (optional) Replacement Language (*Appendix B, Attachment 1, Proposed Contract Subjects (Phase 2)*)

#### Presentation Topics

Presentations should address each topic listed below in the order listed.

- Ensure that you incorporate the relevant requirements from the WA-APCD Requirements List (*Appendix L, WA-APCD Requirements List*)
- Identify all key assumptions throughout the presentation

## **Presentation #1 - Approach to WA-APCD Administration and Governance (MS)**

The presentation shall be conducted by the Bidder's Lead Organization Lead as the primary presenter.

Provide the Bidder's approach to the administration and governance of the WA-APCD and WA-APCD Lead Organization taking into account all relevant WA-APCD requirements in *Appendix L, WA-APCD Requirements List* by addressing the following:

### **1) Organizational Approach**

Provide an organization chart that clearly depicts the proposed organization and management structure and internal reporting for the WA-APCD Lead Organization and Data Vendor and additional Sub Contractors, if any

- a) Provide names, titles and resumes, for those people currently identified to fill these roles, including Key Staff. (*Appendix H, Key Resources Form*)
- b) Identify and provide resumes for the person or people who will be responsible for working regularly with WA-APCD stakeholders and OFM, if known. If not yet known, describe the skill sets you will look for and how you will identify and obtain this person or persons

### **2) Roles and Responsibilities**

Describe the roles and responsibilities for each leadership and management position and each functional area of the proposed WA-APCD Lead Organization and Data Vendor, and any additional Sub Contractors, if any.

### **3) Proposed WA-APCD Governance Structure**

Describe the proposed governance structure for the WA-APCD, WA-APCD Lead Organization and Data Vendor, and including the Advisory Committees (SOW Part 2, Activity 1)

- a) Describe how the Bidder's own organizational governance relates to this structure.
- b) Describe how the proposed governance structure of the WA-APCD relates to OFM.

### **4) Approach to Day-to-Day Operations of the WA-APCD**

Describe how the organization and governance structure and their roles and responsibilities support the day-to-day operations of the WA-APCD and WA-APCD Lead Organization.

### **5) Partnering with the State of Washington**

Describe how the Bidder envisions working with OFM at both a strategic and tactical level to ensure the success of the WA-APCD. Include a description of the Bidder's approach to the project management of the implementation of the WA-APCD Lead Organization and system (SOW Part 2, Activity 17.)

## **Presentation #2 - Approaches to the WA-APCD Statement of Work and Technical Solutions**

This presentation shall be conducted by the Data Vendor and Analytics/Data Products Leads.

Provide the Bidder's approach to the technical solution for the WA-APCD and specific activities of the SOW by addressing the following topics and including all relevant WA-APCD requirements in *Appendix L, WA-APCD Requirements List*:

### **1) Technical Approach to the WA-APCD System and Data (MS)**

- a) Describe the Bidder's Technical Solution for the WA-APCD and why this is the best solution, including (SOW Part 2, Activity 3):
  - i. Overall technical architecture (high level)  
If the approach to the technical solution has proprietary intellectual property, describe what it is and how it is included in the WA-APCD
  - ii. Performing Data Collection
  - iii. Performing Quality Assurance
  - iv. Conducting Data Loading and Storing
  - v. Creating and maintaining a Master Provider Roster
  - vi. Retrieving data and performing analytics/business intelligence
- b) Describe the Bidder's approach to onboarding data submitters' historical and ongoing data submissions over the life of the project and into operations and maintenance. (SOW Part 2, Activities 2, 4a and 4b)
  - i. If the approach includes use of Bidder's existing health care claims data, describe how it will be made available for use under the state mandate.
  - ii. Include the approach to soliciting and obtaining voluntary submission of claims data from the self-insured organizations
- c) Describe the Bidder's approach for the deliverables of the Enhanced Data Collection (SOW Part 2, Activity 4c)

### **2) Approach to Security and Privacy of the WA-APCD System and Data (MS)**

Describe the Bidder's approach to ensuring security and privacy of the data and system, which is of paramount importance to the legislature.

### **3) Approach to Producing the Washington State Common Measure Set for Health Care Quality and Cost Performance Outcomes Reporting (MS)**

Describe the Bidder's approach for producing and updating the deliverables for the Washington State Common Measure Set for Health Care Quality and Cost Performance Outcomes. (SOW Part 2, Activity 15).

### **4) Approach to WA-APCD Analytics and Data Products (MS)**

- a) Describe the Bidder's approach to creating the grant-funded data products. (SOW Part 2, Activities 10, 11, 12 & 13)
- b) Describe the Bidder's approach to establishing the WA-APCD Branding and Website. (SOW Part 2, Activities 6 & 7)

- 5) Approach to Project Timeline and Short-Term Operations and Maintenance (MS)**
- a) Provide a high-level timeline for accomplishing SOW Part 1 and Part 2  
Confirm the Bidder's understanding of Gate #1
  - b) Describe the Bidder's approach to Short-Term Operations and Maintenance of the WA-APCD (SOW Part 2, Activity 14)
- 6) Proposed Cost (M)**  
Review a draft of the Bidder's proposed SOW Activity Costs (Appendix O, *WA-APCD COST WORKSHEET*)

**Presentation #3 – Approach to Business Strategy and Sustainability and Sample Contract Concerns**

This presentation shall be conducted by the Analytics/Data Products and Lead Organization Leads.

Provide the Bidder's approach to the business strategy for the WA-APCD Lead Organization and sustainability of the WA-APCD and WA-APCD Lead Organization taking into account all relevant WA-APCD requirements in *Appendix L, WA-APCD Requirements List* by addressing the following:

- 1) Bidder's Business Strategy (MS)**
  - a) Describe the Bidder's vision for the potential uses, roles of WA-APCD, WA-APCD data and data products and the WA-APCD Lead Organization
  - b) Describe the types of data products the Bidder intends to create and sell to support the WA-APCD and WA-APCD Lead Organization. Provide examples of similar products, if any (limit of four).
  - c) Describe the markets for these products and how the Bidder will establish and grow these markets.
  - d) Provide the strategy for getting the revenue-generating business of the WA-APCD up and running
  - e) Discuss how the skills and experience possessed by the management and Key Staff will lead to a successful implementation of the business strategy and achieve the vision of the WA-APCD articulated in the law
- 2) Describe the Bidder's sustainability strategy: (MS)**
  - a) Provide a draft of the Bidder's Sustainability Plan (*Appendix K, Sustainability Plan Template*)
  - b) Identify the necessary activities, support, etc. for operations and maintenance of the WA-APCD and WA-APCD Lead Organization
  - c) Acknowledge the gated approach (SOW Gate #2) to the decision for the scope of work/level of effort for operations and maintenance of the WA-APCD and Lead Organization and their sustainability. Describe the planning the Bidder will do to participate meaningfully in the discussions on these topics at the time designated by OFM.
- 3) Sustainability Plan (BP)**

Discuss at a high-level the anticipated expenditures and revenues in your Sustainability Plan
- 4) Draft List of Contract Issues and Proposed Replacement Verbiage (M)**

Identify the Bidder's major issues with the draft contract and provide proposed replacement verbiage where possible.

## REFERENCE SECTION (M/BP)

Bidder must complete the Bidder References form in Appendix I, Bidder References Form for both the Lead Organization and the Data Vendor as part of their response. The Bidder must provide three (3) references for each organization.

By submitting a response to this CP, the Bidder and team members grant permission to OFM to contact these references and others, who from OFM's perspective, may have pertinent information. OFM may or may not, at OFM's discretion, contact references.

The OFM reserves the right to contact Bidder's references, by telephone or other means, and evaluate the Bidder based on these references. The OFM considers references to be very important. It is the Bidder's responsibility to ensure that references are aware that contact may be made by the OFM during the evaluation period and that at least one of the contacts at each reference will be available during that time period set forth in the section titled, *Estimated Schedule of Procurement Activities*.

The OFM will make a reasonable effort to call Bidder references, in random order, on the dates set forth in the section titled, *Estimated Schedule of Procurement Activities* until three references have been contacted, the list of references submitted by the Bidder are exhausted or the time for contacting these references has expired.

*Bonus Points: the Bidder's experience in meeting budget and timelines for report generations*

## PHASE 3

### PROPOSAL REFINEMENTS/FINAL SUBMISSION

Bidders who are determined by the Evaluation Teams to have the best combination of attributes for success are identified in Phase 2 are invited to this Phase 3: Proposal Refinement/Final Proposal Submission.

#### Documentation

Provide the following in the Bidder's Final Proposal Submission:

- 1) Detailed written response to the Presentation Topics in Phase 2
  - a) Include all verbal assertions made during the Phase 2 presentations
  - b) Include all assumptions
  - c) Highlight all changes to the Bidder's approaches from the Phase 2 presentations
- 2) Final Completed Key Resources Form (*Appendix H, Key Resources Form*)
- 3) Resumes of Key Staff including:
  - a) Lead Organization Lead
  - b) Data Vendor Lead
  - c) Analytics or Data Products Lead
  - d) Security Lead
  - e) Lead Organization Stakeholder/OFM Liaison (if identified)
- 4) Final Sustainability Plan (*Appendix K, Sustainability Plan Template*)
- 5) Final SOW Activities Cost (*Appendix O, WA-APCD Cost Worksheet*)
- 6) Final List of Contract Issue Items and (optional) Replacement Language (*Appendix B, Attachment 1*)