

Rhode Island Quality Institute  
235 Promenade Street, Suite 600  
Providence, RI 02908

### **Request for Proposal**

#### TERMS AND REQUIREMENTS FOR BIDDING

Item Description: **Inside Sales Representative Service**

Date and Time to be opened: Thursday, May 19, 2011, 5:00 P.M.

Bids may be submitted up to 5:00 P.M. on the above meeting date at the Rhode Island Quality Institute front desk.

#### INSTRUCTIONS

1. Vendors must submit sealed bids in an envelope clearly labeled with the above captioned item. Please address the bid envelope and information relative to the bid to the attention of Ms. Jennie Gordon, Director, REC Program Management.
2. Bids must meet the attached specifications. Any exceptions or modifications must be noted and fully explained.
3. Bidder's responses must be in ink or typewritten, and all blanks on the bid form should be completed.
4. The price or prices proposed should be stated both in WRITING and in FIGURES.
5. Bids SHOULD BE TOTALED. Do not group items: price each item individually. Awards may be made on the basis of total bid or by individual items.
6. Each bidder is required to state in his proposal his full name and place of residence; and must state the names of all persons or firms with whom he is submitting a joint bid. All bids SHOULD BE SIGNED IN INK.

#### NOTICE TO VENDORS

1. The Rhode Island Quality Institute ("Institute") will make the award to the bidder who submits a bid which, in the Institute's sole judgment, best satisfies the requirements of this request for proposal.
2. No proposal will be accepted if made in collusion with any other bidder.
3. A bidder who is an out-of-state corporation shall qualify or register to transact business in Rhode Island.
4. The Institute reserves the right to reject any and all bids(s)
5. Where prices are the same, the Institute reserves the right to award to one bidder, or to split the award.
6. As the Institute is exempt from the payment of Federal Excise Taxes and Rhode Island Sales Tax, prices quoted are not to include these taxes.
7. In case of error in the extension of prices quoted, the unit price will govern.
8. The contractor will not be permitted to either assign or underlet the contract, nor assign either legally or equitably any moneys hereunder, or its claim thereto without the previous written consent of the Institute's Chief Operating Officer.
9. Delivery dates for goods must be shown in your bid. If no delivery date is specified, it will be assumed that an immediate delivery from stock will be made.
10. A certificate of insurance may be required of a successful vendor.

11. Bids for goods may be submitted on an “equal” in quality basis. We reserve the right to decide equality.
12. Bidders must indicate brand or the make being offered and submit detailed specifications if other than brand requested.
13. No goods should be delivered or work started without a Purchase Order.
14. Please submit one original and two copies of your bid.

CONSTRUCTION AND SERVICE BID TERMS

1. The Institute will not consider any bid unless it is accompanied by a CERTIFIED CHECK FOR \$ N/A to be deposited with the Institute as a guarantee that the Contract will be signed and delivered by the bidder; OR
2. The Institute will not consider any bid not accompanied by a bid bond in the amount of N/A per centum (%) of the proposed total price, to be deposited with the Institute as a guarantee that the contract will be signed and delivered by the bidder; and in default thereof, the amount of such check or bid bond shall be retained for the use of the Institute as liquidated damages on account of such default.
3. A performance and payment bond with a satisfactory surety company will be posted by the successful bidder in a sum equal to one hundred per centum (100%) of the awarded contract.

Not Required

Required

4. It is hereby mutually understood and agreed that no payment for extra work shall or will be claimed or made unless ordered in writing by the Institute.
5. Awards will be made within sixty (60) days of bid opening. All bid prices will be considered firm, unless qualified otherwise. requests for price increases will not be honored.
6. Failure to deliver within the time quoted or failure to meet specifications may result in default action in accordance with the general specifications. It is agreed that deliveries and/or completion are subject to strikes, lockouts, accidents and Acts of God.
7. Only one shipping charge will be applied in the event of partial deliveries for blanket or term contracts.
8. The successful bidder shall, prior to commencing performance under the contract, attach and submit evidence that they have complied with the provisions of the Rhode Island Worker’s Compensation Act Title 28, Chapter 29, Section 1, et seq. (R.I.G.L.). If the successful bidder is exempt from compliance under the Worker’s Compensation Act, an officer of the successful bidder shall so state by way of sworn Affidavit, which shall accompany the signed contract.
9. The successful bidder shall prior to commencing performance under the contract attach and submit a certificate of insurance, in a form and in the amount satisfactory to the Institute by which the successful bidder will indemnify and hold harmless the Institute during the term of the contract from and against all loss or damages arising from the performance under the contract including all claims for personal injury or damages to property sustained by third persons, or their agents, servants and/or those claimed under them.

## DESCRIPTION AND / OR SPECIFICATIONS

### Invitation to Bid: Inside Sales Representative Service

1. The Rhode Island Quality Institute (“Institute”) is seeking proposals for an Inside Sales Representative Service to support the process of enrolling people in the currentcare health information exchange.
2. Instructions to Bidders

- a. Estimated Project Schedule

- i. Estimated Schedule

Advertise date: Thursday, May 19, 2011

Technical questions/inquiries due: Friday, May 27, 2011

Bid opening date: Friday, June 3, 2011

Contract award date: Friday, June 10, 2011

- ii. Estimated Project Milestones (based on Contract Award Date)

Contract Execution: Award + 1 week

Kick-Off Meeting: Contract Execution + 1 week

- b. Selection Process

After the initial review of proposals by a Review Committee, Vendors may be asked to appear before the Committee to make a formal presentation regarding their proposal. Following the interviews the Institute may ask for additional information from any and/or all Vendors. During this time period the Institute may also wish to conduct site visits to other customers using proposed services at the bidder’s expense. After receipt of all information, the Review Committee will make its recommendation to the Institute’s Chief Operating Officer.

Following the designation by the Review Committee of the preferred Vendor, the Institute will enter into contract negotiations. If the Institute is unable to complete and execute a contract with a selected Vendor, the Institute reserves the right to extend or suspend negotiations, or begin negotiations with another Vendor or terminate all negotiations. Once a contract has been substantially agreed to, the Director, REC Program Management will submit the contract to the Institute’s Chief Operating Officer for approval.

The Institute’s Chief Operating Officer has the sole authority to award this contract.

- c. Evaluation Criteria

The winning Vendor will be selected based upon the following selection and evaluation criteria:

Conformance to Technical Specifications: 40%

Vendor’s Capability and Experience: 30%

Price: 30%

Total: 100%

- d. Response Format

- i. Bidder’s Blank (attached) should be the first page of the response.

- ii. Summary section, including the following items:

- o A description of the equipment, software, services, and other components being proposed

- o A summary of costs, broken down by major service components and any requested options
  - o An exceptions listing (by paragraph number) of any specifications that have NOT been met.
- iii. Itemized response to RFP
 

Vendors shall submit itemized responses where specific information is requested, following the paragraph numbering plan in this RFP. It is preferable for the Response to contain the actual text of the RFP followed by the Vendor's response to that paragraph. For paragraphs that only specify requirements, Vendor should reply to each with at minimum an acknowledgment that the requirement has been read, understood, and the Vendor will comply. Alternatively, Vendor may include a statement that all specifications will be complied with other than those for which a specific exception is stated.
- e. Cost Proposal
 

The cost proposal should clearly show the cost of services.
- f. Supplementary Information
 

Vendor may include further sections or appendices containing drawings, planning documents, or any other supplementary information as desired in the response.
- g. Evaluation Rights
 

The Institute reserves the unqualified right in its sole and absolute discretion to choose to qualify or reject any or all Bidders either on the basis of an evaluation or the factors listed in the RFP or for other reasons, including, but not limited to, the convenience of the Institute.
- h. Waiver of Minor Informalities, Deviations, Mistakes, and Matters of Form
 

The Institute reserves the right to waive any "minor informalities," minor deviations, insignificant mistakes, and matters of form rather than substance, and to seek clarification of the proposal or contract document which can be waived or corrected without prejudice to other Bidders, potential Bidders, or the Institute.
- i. Prime Vendor Responsibilities
 

The Institute requires a single point of responsibility for the contract resulting from this RFP. Subcontractors may be used, but the selected vendor, as Prime Contractor, must maintain the lead in all facets of the contract, and must accept full responsibility for any subcontractor's performance. The subcontracted value of the work shall not exceed 50% of the contract value. All subcontractors must be identified and the types of contractual arrangements described. If the Institute deems that the proposed arrangements do not provide clear lines of authority and responsibility, the proposal will be deemed non-responsive. The Prime Contractor shall be responsible for meeting all of the terms of the contract resulting from this RFP.
- j. Site familiarity
 

Each vendor is responsible for being knowledgeable of all conditions of these specifications. Each vendor, by making a bid, represents that the bid documents have been read and understood and the vendor is familiar with the local conditions under which the work is to be performed. No approval for additional funds will be given for work resulting from the vendor or its subcontractors being unfamiliar with the conditions under which the work is to be performed.

- k. Questions and Inquiries regarding RFP  
Bidders may submit questions regarding the RFP to Jennie Gordon via email to [jgordon@riqi.org](mailto:jgordon@riqi.org)

No officer or agent of the Institute is authorized to waive this requirement. No questions will be accepted if not received by Friday, May 27, 2011

Responses to questions, along with any necessary Addenda to the RFP, will be provided to bidders by Tuesday, May 31, 2011

- l. Confidentiality  
Information required for submission with proposals shall be handled as confidential data and utilized on a “need to know” basis, to the extent permitted by law.
- m. Applicable Codes and Regulations  
All services provided by the Vendor must conform to all applicable Federal, State of Rhode Island, and City of Providence codes, all local laws and ordinances.

### 3. Overview Purpose of RFP

The Institute is seeking an Inside Sales Representative Service (“Service”) to support the process of enrolling people in the currentcare health information exchange. The Service will work collaboratively with the Institute’s currentcare Education and Outreach Associates and under the direction of the Director, REC Program Management (“Director”).

#### Background

currentcare is Rhode Island’s Statewide Health Information Exchange (HIE) and is a statewide repository of patient-level clinical data (Protected Health Information). Participation in currentcare is voluntary. That is, for a person’s clinical data to be put in the currentcare repository, the person must first sign an enrollment form indicating consent to do so. Once enrolled, a master record for the person is created in currentcare, and data (for example, lab results) begins to flow into currentcare. The program’s success relies on enrolling people so that their health information is available at the time of service when their healthcare provider searches for it. More information about the HIE is available at [currentcareri.org](http://currentcareri.org)

To help get people to enroll in currentcare, the Institute engages medical practices as Enrollment Partners. The currentcare Education and Outreach Associates recruit each Enrollment Partner, negotiate a Letter of Agreement, train the medical practice staff, and help the staff implement the enrollment process into their workflow. Once the enrollment process is in operation, the Institute tracks the Enrollment Partner’s performance in their ability to enroll patients that visit their office, provides ongoing support and pays a subsidy for each successful enrollment.

There are currently approximately 350 Enrollment Partners.

From time to time, it is necessary for the Institute to intervene with an Enrollment Partner. The reasons for the interventions vary, but usually concern the quality of the forms the Partner is submitting to the Institute or a fall-off in the Partner’s productivity. Up until

now, the currentcare Education and Outreach Associates performed such interventions. Going forward, the Institute would like to use Inside Sales Representatives to do so, thereby enabling the Education and Outreach Associates to concentrate on recruiting new Enrollment Partners.

The Institute expects:

- The Service, in collaboration with the currentcare Education and Outreach Associates, will enable the Institute to reach its goal of 265,000 currentcare enrollments by the end of 2011. As of the end of April, 2011, there were 148,000.
- The quality of the Service will align with the Institute's high standard of excellence and its mission to advance the quality, safety and value of health care for all Rhode Islanders
- The Service will use direct telephone calls to accomplish the mission
- The Enrollment Partners will perceive the Inside Sales Representatives to be members of the Institute's team
- The Service representatives will create a relationship with the practice staff and serve as an extension of the Institute's team.

#### 4. Terms and Conditions

The Institute desires to implement the Service in two stages: 1) Pilot Operation; 2) Full Deployment.

The Pilot Operation stage will demonstrate the feasibility and value of the Service for driving new currentcare enrollments. The Pilot Operation will be in operation for a period which the Institute and the Service vendor will determine, but which the Institute expects to be on the order of three months. At completion of the Pilot Operation, the Institute shall have the option to proceed to Full Deployment or to terminate the Service agreement.

If the Institute decides to proceed to Full Deployment, the Institute and the Service vendor will execute a mutually acceptable long-term service agreement. The terms and conditions of the agreement shall be finalized when the Institute decides to proceed to Full Deployment.

#### 5. Vendor Qualifications

##### a. Qualifications and Experience

- Describe the program you could offer to assist RIQI in achieving its 2011 enrollment goals.
- What is your sales technique?
- What are the qualifications of the telephony staff hired?
- Do you require a college degree of those hired?
- Describe your coaching process.
- How do you assure quality?
- What is your approach to handling objections and barriers during a provider interaction?
- Describe the ramp-up process with a new customer.
- Describe your proposed set of metrics and their frequency.

- ##### b. List at least 3 customer references for the provision of services of similar function and scope. Include customer name, contact person and phone number and dates of service. If subcontractors will be used, supply references for subcontractor(s) as well.

## 6. Service Requirements

The Institute requires the following services:

- Producing Enrollments
  - Reach the goal of 265,000 currentcare enrollments by December 31, 2011
- Prospecting
  - Identify prospective Enrollment Partners
  - Arrange face-to-face meetings for the currentcare Education and Outreach Associates
  - Arrange delivery of enrollment program materials, such as enrollment forms, posters and displays
- Enrollment Partner Account Management
  - Using data produced by the Institute's Operations Department, track Enrollment Partner performance and report it to the Education and Outreach Associates and the Director
  - At the direction of the Director, intervene with Enrollment Partners to address productivity and quality issues
  - Intervene with Enrollment Partners to assess their satisfaction with their relationship with the Institute
- Service Analytics
  - Track the Service performance, such as a log of daily contacts. The Bidder should propose the recommended set of metrics and the form of presentation. The final set of metrics and the form of presentation will be mutually determined by the Bidder and the Institute.

If at any time the Institute determines the Service is not meeting expectations, the Institute may terminate the Service with one month's notice.

BIDDER'S BLANK

Name of Company:

Agrees to bid on: Inside Sales Representative Service

Date of Award

Total Amount in Writing:

Total Amount in Figures:

Additional Bidding Details (Use Additional Pages if Necessary)

Federal ID# or Social Security #:

Signature:

Title of Person signing:

Firm Name:

Address:

Phone #:

Delivery Date:

Name of Surety Company