

Request for Qualifications (RFQ) – Field Resources

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Introduction

The Physician Information Technology Office ([PITO](#)) is operated as a division of the [British Columbia Medical Association](#) (BCMA), pursuant to the 2007 BC Physician Master Agreement. The BCMA administers PITO's human resources, financial and contract relationships.

The Physician Information Technology Office (PITO) is requesting proposals from vendors capable of providing professional services in the following disciplines:

- Project Management
- Change Management and Workflow Redesign
- Conversion Support
- Specialized Technical Support

Additional categories may be added from time to time.

Unless otherwise amended, this RFQ will be open until March 31, 2012. PITO reserves the right to update, modify or discontinue this RFQ at any time at its sole discretion without penalty. PITO reserves the right to temporarily suspend the RFQ for a period, in whole or for a specific resource pool, if the size of a resource pool significantly exceeds demand.

PITO will maintain pools of qualified resources in each resource category and subsequently match those resources to specific clinic requirements on a case by case basis in consultation with the physician and/or clinic staff. On the first occasion that a vendor's resource is selected to support a clinic, the vendor will be required to enter into a standard General Services Agreement with PITO through the British Columbia Medical Association (BCMA). Resources provided by that vendor will be assigned for a specific deliverable or service through a Statement of Work (SOW) process, the duration of which will vary based on the clinic's need and budget allocation. Each SOW will serve as an amendment to the General Services Agreement and will describe the services and deliverables to be provided, estimated effort, schedule, background information, governance/reporting, and maximum fees and expenses. Standard rates for each service will be pre-determined by PITO in advance. PITO reserves the right to modify those standard

rates from time to time at its sole discretion for subsequent SOWs. Vendors may accept those rates or withdraw some or all of their unassigned resources from the resource pool.

Notwithstanding that resource pool(s) may be established pursuant to this RFQ, PITO reserves the right to conduct an open competition or sole-source acquisition for any contracted resource requirements identified during the term of this RFQ. In the event that PITO elects to conduct any open competition for services, having resources in the resource pool shall not prevent the Vendor from being eligible to submit responses to such competitions, including, at the Vendor's discretion, its resources among those in the resource pool.

RFQ Terms and Conditions

Subject to changes that may be required from time to time at PITO's sole discretion, PITO/BCMA will administer the resource pool established by this Request for Qualifications as follows:

1. Vendors may tender submissions at any time during the term of this Request.
2. Vendors must have at least one resource available and selected for a Resource Pool (category) to be considered as a selected Vendor under this RFQ.
3. Vendors and their resources must possess the relevant methodology(ies) and skills for the related service to be selected under this RFQ and have resources added to a particular resource pool.
4. Vendors must have at least two acceptable references for comparable projects to be selected under this RFQ.
5. Vendors that have been selected and had Vendor resources included in a Resource Pool shall be advised by PITO of the names of such resources, the associated Resource Pool (s) and the effective date of inclusion.
6. Vendors may, at any time during the term of this Request, submit for PITO's consideration additional resources that may qualify for inclusion in any Resource Pool.
7. Vendors may, at any time during the term of this Request, submit for PITO's consideration an update to a resource's qualifications.
8. Vendors should advise PITO if a resource placed in a resource pool ceases to be available for an extended period. PITO reserves the right to request an update to resource availability from time to time.
9. Submissions delivered after the initial submission date shall be subject to the same terms and conditions of this Request in their entirety.
10. Vendors having a resource selected from a Resource Pool established through this RFQ will be required to enter into a standard General Services Agreement prior to providing services.
11. Vendors in breach of the terms of this RFQ or the General Services Agreement, or who receive a poor evaluation of the services delivered may, at the sole discretion of PITO and as related to this Request only, have individual or all resources removed from any established resource pools and, further, may not be permitted to offer subsequent resources.
12. There is no guarantee of contracts, duration of contracts, or number of contracts under this RFQ.

13. Resources will be evaluated for suitability for the proposed resource pool based on the resume provided (see resource pool descriptions and criteria in Appendix A).
14. Resources will be selected from the relevant resource pool for a particular project (SOW) at PITO's sole discretion, in consultation with the clinic for which the services are being sought, based on:
 - a. the resume on file, interviews and/or reference checks
 - b. the vendor's relevant methodologies and tools as described in the Vendor Profile (see "Submissions" below)
 - c. reviews of prior services provided under this RFQ
 - d. resource availability
 - e. resource location relative to the clinic, and availability of travel
15. Resources must follow any guidelines or requirements stipulated by PITO in the SOW.
16. Resources must undergo a standard PITO orientation prior to initiating a deliverable or service under an SOW to establish a sound understanding of PITO-related context and related information.
17. Vendors may be required to provide an RCMP criminal records check, conducted within the last 12 months, prior to assignment of any resource under an SOW.
18. Standard rates for specific services will be pre-determined by PITO. PITO reserves the right to modify those standard rates at its sole discretion. Vendors may accept those rates or withdraw some or all of their unassigned resources from the resource pool. Time during travel will be paid at 75%.
19. The maximum contract value for each SOW under this RFQ will be the lesser of \$5,000 per physician or \$75,000 in total. Any project over this amount will be procured individually outside this RFQ.
20. Reimbursement for travel and other authorized expenses will be paid in accordance with the standard BCMA rates.
21. All Vendors are required to carry General Liability and Errors & Omissions Business Insurance to a minimum of one million (\$1,000,000.00) dollars.
22. Vendors must disclose any real or perceived current or potential conflicts of interest of their company or any proposed resources at time of Submission. PITO may discard any proposals or individual resources if it finds, at its sole discretion, there is an unacceptable conflict of interest.

Submissions

Vendors must submit a proposal with a cover letter, vendor profile, and a resume for each proposed resource as described below. Any proposal that is ambiguous, unclear, unreadable, or that does not meet the requirements listed below may be discarded.

Proposals must be sent in either Microsoft Word or Adobe Acrobat PDF format to hr@pito.bc.ca with the subject line "RFQ – Field Resources – [vendor name]". Any subsequent submissions of additional resources should use the subject line "RFQ SUPPLEMENT– Field Resources – [vendor name] – [resource name]".

Please do not submit resources which will not be available within six months. Such resources can be submitted in the future when they become available.

1. Cover letter

- Introduction to the Vendor's organization
- A clear statement that the terms and conditions of this Request have been read, understood and agreed to in their entirety
- Signed by an authorized company representative

2. Vendor Profile

- The **full legal name** of the Vendor
- A description of the Vendor's type of business (e.g. sole proprietorship, partnership, corporation)
- A description of methodologies or tools developed or used by the Vendor for the services requested under this RFQ (Project management of EMR implementations, change management and workflow redesign in a medical office setting, and conversion support for EMR data conversion) – focused and customized methodologies and tools are preferred
- Quotes and contact information for two references for projects delivered by the Vendor that are comparable to the projects to be delivered under this RFQ (references may be contacted)
- A vendor contact for all questions and clarifications arising from the Submission. The contact information should include the contact person's title, address, email, telephone number and fax number.

3. Resource Resumes

Each resume must include:

- Candidate name
- Resource pool category for which the resource is being proposed
 - i. project management
 - ii. workflow/change support
 - iii. conversion support
 - iv. specialized technical support
- Experience related to each resource pool for which the resource is being proposed
- Formal education and related certifications
- Quotes from at least two client references for projects delivered by the Resource, for directly similar projects, with reference contact information (references will only be contacted when a resource is considered for a specific project/SOW)
- Projection of first date of availability and any limitations on availability or travel

Appendix A: Resource Pool Descriptions and Evaluation Criteria

Project Management	
Deliverables and Services	<p>Project Managers manage clinic implementations, or groups of implementations, that have been identified as complex or high risk through PITO's pre-implementation readiness, needs and risk assessments.</p> <p>Project Managers work very closely with the clinics' physicians and staff (often a Clinic Manager and a physician lead) to assist them in coordinating the EMR implementation. In particular, the Project Manager helps to ensure practice readiness, coordinate stakeholders (e.g. EMR supplier, the Private Physician Network installation, local IT support, health authorities and private laboratories for interfaces), manage risks and issues, support effective communication, and coordinate other Field Resources that may be assigned by PITO (e.g. conversion support or workflow/change support).</p> <p>Project Managers are expected to provide regular status reports to the clinic and PITO, and to other stakeholders as required, addressing: status, schedule, issues, risks, costs.</p>
Expected Education	Undergraduate or graduate university education in computer science, health information science, business, or directly related field
Expected Certifications	Current Project Management Institute (PMI) certification or direct equivalent (e.g. PMBOK), or combination of experience and accepted methodology
Expected Experience or Background	<p>Minimum 5 years of relevant experience</p> <p>Experience in managing comparable projects in environments with very high expectations and minimal tolerance for delay or issues, preferably with experience implementing ambulatory care EMRs or other clinical information systems used by doctors</p> <p>Experience and knowledge of distributed computing systems involving client-server software and wide area networks</p> <p>Strong experience and track record of being pro-active and working independently</p> <p>Strong office computer skills including use of MS Office software</p>

Change Management and Workflow Redesign

Deliverables and Services	<p>Specific needs will vary by clinic, to be defined in each SOW:</p> <ul style="list-style-type: none"> • In-depth readiness assessments • Assessing current clinical workflow processes within a clinical environment for both physicians and staff, identifying required changes related to efficiency or the implementation of the new EMR, and providing documentation and training related to required changes, in consultation with the Clinic’s selected EMR supplier • Providing coaching to assist practices in preparing for or adapting to change • Conflict resolution and mediation support
Expected Education	<p>Undergraduate or graduate university education in business, computer science, health information science, or directly related field</p>
Expected Certifications	<p>Current Project Management Institute (PMI) certification preferred</p> <p>Formal workflow training</p> <p>Mediation or conflict resolution certification preferred</p>
Expected Experience or Background	<p>Minimum 5 years of relevant experience</p> <p>Experience in providing physician office practice support services</p> <p>Experience and demonstrated skills in facilitating user group sessions</p> <p>Workflow re-design experience in a clinical setting preferably in the outpatient practice environment</p> <p>Strong professional communications</p> <p>Strong office computer skills including use of MS Office software</p> <p>Mediation or conflict resolution experience</p>

Conversion Support

Deliverables and Services	<p>Specific needs will vary by clinic, to be defined in each SOW:</p> <ul style="list-style-type: none"> • Assessing a clinic’s existing EMR data • Proposing a data conversion and archiving strategy based on the existing data/EMR and the new EMR, and PITO’s Conversion & Archiving Strategy • Identifying major workflow or related changes that will be experienced with the EMR conversion • Providing workflow change support or collaborating with a workflow/change management resource on identified changes related to conversion • Coordinating conversion with the outgoing and incoming EMR vendors and the clinic • Identifying and communicating risks and issues identified
Expected Education	<p>Undergraduate or graduate university education in computer science, health information science, business, or directly related field</p>
Expected Certifications	<p>Current Project Management Institute (PMI) certification preferred</p> <p>ISACA (CISA) certification preferred</p>
Expected Experience or Background	<p>Minimum 5 years of relevant experience</p> <p>Experience with complex software conversions, preferably clinical information systems</p> <p>Experience and expertise in conducting or overseeing data analysis, mapping, conversion and migration</p> <p>Experience and expertise in assessing software conversion workflow impact</p> <p>Knowledge of data standards including, in particular, HL7, XML, SNOMED, ICD-9/10, LOINC</p> <p>Experience with system interoperability in complex, multi-stakeholder environments</p>

Specialized Technical Support

<p>Deliverables and Services</p>	<p>Specialized technical support services provide expert advice and support to staff of medical clinics implementing EMRs, and to the clinics' service providers for network, local IT support, and EMRs. The technical support services will provide services under the direction of the Technical Support Program Manager and the Senior Technical Analyst to provide the following services:</p> <ul style="list-style-type: none"> • To act as a technical reference, educator/trainer and advisor to clinics implementing EMRs and the Private Physician Network (PPN) • To act as a technical architect for developing and recommending solutions for clinics in consultation with the Senior Technical Analyst and various parties involved in the PITO program. • Troubleshoot and resolve issues with stakeholders to resolve technical issues experienced by individual clinics or groups of clinics. • Mitigate practices' implementation risk and support a smooth implementation through the co-ordination of technical issues.
<p>Expected Education</p>	<p>Undergraduate degree in computer science, or an equivalent combination of education, training, and extensive experience</p>
<p>Expected Certifications</p>	<p>Technical and/or specific networking certifications preferred</p>
<p>Expected Experience or Background</p>	<p>Very strong, proven expertise in trouble-shooting and addressing problems in local area networks, wide area networks, PCs, servers, etc.</p> <p>5-7 years' network management/administration experience – designing, analyzing, maintaining, supporting, and troubleshooting medium to large WAN and LAN infrastructures, workstations, laptops, printers, and scanners</p> <p>Practical network or packet analysis experience using software tools, such as Wireshark</p> <p>Experience with remote access/VPN technologies</p> <p>Basic knowledge of Electronic Medical Record technology and eHealth concepts</p> <p>Experience supporting private medical office settings strongly preferred</p>