

* REQUEST FOR PROPOSAL - RFP

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Preparing the Request for Proposal EHR

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Presentation Will Cover

- * Description and use of the RFP
- * Difference between RFP and RFI
- * Structure of the RFP
- * Suggestions for the RFP
- * Opportunity to Practice what you learned



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What is an RFP?

- * Legal, proprietary document prepared by the Hospital to identify and attract the right vendors to supply the software, hardware, operating system and interoperability required for a successful e Electronic Health Record
- * Part of the life cycle of the EHR application



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What is an RFP? (Cont)

- * Its purpose is to provide the information to the decision maker's required to select the vendor finalist(s)
- * Eliminate the vendors the hospital no longer wishes to consider



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First Impressions

- * RFP may be the first contact with the vendor
- * Will set the tone for a professional relationship with the vendor
- * Will become part of future agreements (contracts)
- * Instrumental in due diligence



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Code of Conduct for Vendor Selection

- * Educate all members of the staff on the Code of Conduct
- * Will reduce your risk that a vendor can claim unfair treatment
- * Portrays the appropriate professional climate



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The Difference Between the RFP and the RFI

RFP-

- * Small number of final vendors, 4 or less
- * Comprehensive
- * Information gathering tool on specific vendors
- * Asks for pricing

RFI-

- * Large number of potential vendors >5
- * Limited in scope
- * Information gathering tool on the industry
- * May not ask for pricing



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Step Two

- * You did Step One during the Planning Phase
- * If you did not go through a Planning Phase do not attempt Step Two



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During Step One You:

- * Accomplished your need's assessment, goal setting, process mapping, etc.
- * You have to be able to reflect this in the RFP so the potential vendor understands what you want to accomplish with your EHR



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A Structure for the RFP

- * Contact Information
- * Hospital background and information
- * Vendor background and information
- * References
- * System Features
- * Pricing and Contracts



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A Structure for the RFP (cont)

- * System Support
- * Implementation
- * Documentation and training
- * Technical design and operational requirements
- * Report generation and tools
- * Security
- * Confidentiality



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Contact Information

- * Legal Name of the Hospital
- * Name of single contact
- * Method of contact
 - * Mail-address for delivery
 - * Email
- * Deadline for response



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Hospital Background and Information

Hospital demographics-

- * Type of hospital
- * Number and locations of hospital sites
- * Number of providers and other staff
- * Number of visits for past three years
- * Number of new patients for future three years



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Other Information About the Hospital

- * Anticipated changes in the hospital
- * Share your vision of the hospital and what you wish to accomplish with the product
- * Touch on the major applications (documentation, decision support, e-prescribe) to give the vendor the scope of your EHR



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Primary Contact

- * One person with ultimate responsibility for preparation of the RFP and contact with the vendors
- * Okay to have a Steering Group, but the person doing the RFP should manage the process
- * Prevents vendor from doing the “end run”



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Requested Vendor Background

- * Contact Information
- * References
- * Research Activities
- * Staffing
- * Recent acquisitions and mergers
- * Financial Statements



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Requested Vendor Background (Cont)

- * Business alliances and partnerships
- * Years in the business



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Contact Information

- * Vendor's primary contact information
- * Vendor's preferred method of communication
- * Locations
 - * Corporate Headquarters
 - * Field support offices



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References

- * Total number of installations
- * Client installations similar to your hospital
- * Contact information for three hospitals similar to yours



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Research Activities

- * Product Development
- * Number of new products/applications in the last 3-5 years
- * Good place to ask about what is an upgrade and what is an enhancement



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Number and Breakdown of Vendor's Employees

- * Skill sets available
- * Level of sub-contracting
- * What personnel resources are included in the basic contract and what is an additional charge



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Recent Acquisitions and Mergers

- * Some indication of the vendor's role in a larger organization
- * Is the EHR product a “leader” or “feeder” application?
- * How much does the primary vendor control?
- * Answer the “off shore” question

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Financial Statements

- * Ask for last five years
- * Should provide indication of the financial stability of the company
- * Be prepared for refusal to provide financial statements if the vendor is not a traded company

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First Practice Exercise

Based on the needs assessment and the goals you have set for your hospital, in 75 words or less, write a paragraph to include in the description of your hospital section of the RFP that will provide the vendor an overview of how you will use the EHR.



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System Features

- * EHR Features
- * Pricing and Contracts
- * System Support
- * Implementation
- * Documentation and Training



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System Features (Cont)

- * Technical Design and Operational Requirements
- * Integration with billing and other systems
- * Other Interfaces
- * Report Generation and Tools
- * Security



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EHR Features

- * Clinical Management
- * Clinical Documentation
- * Workflow
- * Clinical Content



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Clinical Management

Ability to manage information about your patient population:

- * Ability to search and report on prescribed medications in case of a drug recall
- * Ability to transfer demographic information between the HER and other systems

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Clinical Documentation

Documentation at the patient level:

- * Ability to build notes from drop down menus
- * Web based patient interviewing that can be incorporated into a note
- * Ability to carry forward review of systems, problem list, and medications

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Workflow

Care for patient as they move through the system-

- * Generate task lists for providers and other hospital staff



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Clinical Content

Clinical Tools

- * Patient education materials
- * Integrated evidence based guidelines for adult medicine



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Pricing

- * Separate pricing for software, implementation, interfaces, hardware, etc
- * Method of pricing – it can be
 - * Number of providers
 - * Number of users
 - * Concurrent users
 - * Patient census

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Pricing (cont)

Maintenance and support pricing – does it include?

- * Warranty Periods
- * Future Enhancements
- * Operating system and related environmental software
- * Migration to emerging technologies

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Contract

- * Ask for a copy of the vendor's standard contract
- * Check the contract to see if modification is prohibited



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System Support

- * Disaster Recovery
- * Support coverage hours
- * Response Time
- * Range and average system downtime
- * Help Desk



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Implementation

- * Overview of implementation process
- * Sample project plan with a timeline
- * Typical time from contract signing to start of implementation



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System Documentation

- * Description of documentation provided
 - * Application manuals
 - * System administrator manuals
 - * Operating system manuals
 - * Training manuals
- * Documentation media – hardcopy, CD, web



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Training Documentation

- * Training offered
 - * Duration
 - * Location
 - * Associated costs
 - * Provider specific?
 - * Retraining/training of new employees
- * Training/test system provided

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Technical Design Documentation

Information on the environment in which the system functions:

- * Application web based or client/server?
- * Year of development?
- * Internally developed or acquired from a third party?
- * Backup environment and procedures

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Interfaces

Interfaces have two sides:

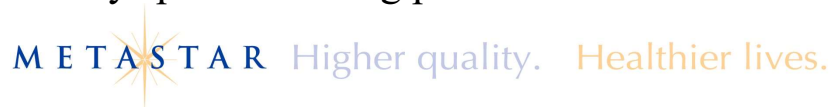
- * Identify additional interface costs from the vendor
- * Identify interfaces required from other vendors



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Report Generation

- * Is the report writing application supplied by a third party?
- * Is there more than one report writer application?
- * Ask the vendor to specify which data elements can be queried
- * Any special training provided?



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Security

- * Another opportunity to ask the “off shore” question
- * Ask for detailed approach to data/information security, especially with regards to internet technologies



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Confidentiality

- * Does the system log all accesses at the user level?
- * Does the system provide a disclosure log to track releases of information outside the hospital?



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Preparing the RFP

- * Be concise
- * Don't ask "can" ask "tell me how"
- * Some questions are yes/no
- * Some questions require a narrative
- * Some questions require both



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Be Concise

- * Two-three sentence questions that can be answered in two-three paragraphs
- * Want to be able to compare responses from different vendors
- * Needs to support due diligence
- * Links responses to contract terms



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Distribution of the RFP

- * Done by the Primary Contact
- * Send it to all vendors at the same time
- * If possible, distribute to all vendors by the same method
- * Do not send the RFP to vendor you have no intention of engaging



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Distribution of the RFP (Cont)

- * Provide a minimum of 8-10 weeks for the vendor to respond
- * Determine how you will handle late responses
 - * Need to be consistent with all vendors
 - * Be consistent with all vendors if you need to request additional information



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Response to RFP

- * Acknowledge receipt of response to RFP
- * Indicate when a decision will be made
- * Notify all vendors of the decision at the same time
- * Non-selection communication is important
- * Timely follow-up with selected vendor to start the next steps

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Some Things to Look For

- * Did the vendor “outsource” the response to the RFP
- * Ratio of “Marketing Material Content” (glossies) vs. an original response tailored to the RFP
- * Beware of vendor supplied RFP templates

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Some Things to Look For (Cont)

- * Some vendors suggest that an RFP is “not necessary”
- * The Standard Contract that cannot be modified
- * The free lunch – If the first response to the RFP is “to do lunch” say “no thank you”



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Second Practice Exercise

One of the vendor recipients of the RFP calls you on the telephone. The person has a list of questions “to more fully respond to the RFP.” The caller wants to meet at your hospital and wants to meet the physicians and other members of the staff.

How do you respond?



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Third Practical Exercise

The deadline for the vendor to respond is in two days. The vendor calls and requests an additional:

- * Day
- * Week
- * Two weeks

How do you respond?

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Fourth Practical Exercise

You have informed the vendors they were either selected or not selected. One of the vendors you did not select calls and wants to meet with you. The vendor wants to bring their CEO.

How do you respond?

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