

2011

WISHIN Market Research/Marketing Services Request for Proposal



Wisconsin Statewide Health
Information Network
12/30/2011



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INTRODUCTION

The Wisconsin Statewide Health Information Network, Inc. (WISHIN), is in the process of building a more expansive service offering and is seeking assistance with market research, messaging, and an aggressive plan for educating potential users and the general public about health information exchange (HIE).

You are invited to review and respond to this WISHIN Market Research and Marketing Services Request for Proposals (RFP). To submit a proposal you must comply with the instructions contained in this document. By submitting a proposal, your firm agrees to the terms and conditions stated in this RFP.

COMPANY BACKGROUND

WISHIN is an independent non-profit organization dedicated to bringing the benefits of widespread, secure, interoperable health information technology to patients and caregivers throughout Wisconsin. WISHIN is building a statewide health information network to connect physicians, clinics, hospitals, pharmacies, and clinical laboratories across Wisconsin.

WISHIN was appointed the state-designated entity for statewide HIE governance in Wisconsin in October 2010. It is a non-profit organization founded by the Wisconsin Hospital Association, the Wisconsin Medical Society, the Wisconsin Collaborative for Healthcare Quality, and the Wisconsin Health Information Organization.

Statewide electronic HIE offers the promise of timely, relevant information that can lead to better clinical decisions, less duplication, more effective transitions of care, and reduced administrative costs. It all adds up to better information and better outcomes.

WISHIN's Mission

To develop and sustain a trusted, secure statewide health information network and information-sharing services that provide value to participants and patients.

WISHIN's Vision

To promote and improve the health of individuals and communities in Wisconsin through the development of information-sharing services that facilitate electronic delivery of the right health information at the right place and right time, to the right individuals.

WISHIN's Goals

- Establish a governance framework that is flexible and enduring
- Develop a path to financial sustainability for ongoing statewide health information exchange



- Develop a scalable, standards-based technical architecture for statewide health information exchange that leverages existing investments in health information technology (HIT)
- Inform and raise the awareness about the benefits of health information technology and health information exchange

KEY DATES FOR THE RFP

Please read this document carefully. The electronic proposal due date is January 20, 2012, at 5:00 PM CST. Responses to this RFP must be submitted to the WISHIN contact noted below. Late submissions will not be accepted.

Event	Date/Time
RFP Posted	December 30, 2011
RFP Question Period	January 6-12, 2012
Answers to Questions Posted	January 13, 2012
Electronic and Hard-copy Proposals Due	January 20, 2012, 5:00 PM CST
Finalist Presentations	Tentatively planned for the week of February 6, 2012
Contract Award	Week of February 15, 2012
Project Kick off	Before March 31, 2012

WISHIN intends to award the contract for the marketing campaign in mid-February 2012. The selected firm will be expected to begin work on the project in the first quarter of 2012, after meeting with WISHIN staff members to further flesh out timelines and deliverable dates.

RFP QUESTIONS AND PROPOSAL SUBMISSION INFORMATION

RFP Questions

Questions regarding this RFP will only be accepted during the RFP Question Period noted in the schedule above. All questions must be submitted in writing by email to Kimberly Johnston, Marketing & Communications Coordinator, at kjohnston@wishin.org. Please



include "WISHIN RFP" in the subject heading of your message. Answers to all RFP questions submitted will be posted on the Vendor section of the WISHIN website www.wishin.org on January 13, 2012.

Proposal Submission

Applicants must submit an electronic version (email) and three bound copies of their proposals by mail prior to January 20, 2012, at 5:00 PM CST. Please see [Proposal Format Requirements](#) for more details on the format for proposals. Proposal should be submitted to the following:

Wisconsin Statewide Health Information Network, Inc. (WISHIN)
Attn: Kimberly Johnston
PO Box 259038
Madison, WI 53725
kjohnston@wishin.org

PURPOSE OF THE RFP

WISHIN will be launching a set of robust, bi-directional, HIE services in October of 2012. The new services will offer a rich set of functionality for end users, including query-driven exchange services for health information (Continuity of Care Documents, laboratory orders, patient referrals, patient problem histories, medication lists, laboratory test results, etc.). The query-driven exchange can be used across different health care systems, between different electronic health record systems, or as enhancements within the same system or network. The new services will also accommodate image-sharing and provide connectivity to state and federal government health systems (e.g., the Wisconsin Immunization Registry) and networks (e.g., Social Security Administration) for query and reporting.

It is essential for the success of these services and the long-term sustainability of WISHIN to have widespread participation in these services by health care providers, payers, and other health-related stakeholders.

The purpose of this RFP is to obtain the professional services of a marketing/market research firm to assist WISHIN in developing and conducting product and messaging market research for WISHIN's expanded services, along with developing a marketing and communications plan, messaging for those service offerings, a "tool kit" of creative materials and other collateral.

PROPOSAL CONTENT REQUIREMENTS

Responses to this RFP must:



- 1) Include a narrative of your proposed approaches or methodologies for WISHIN's service rollout (be inclusive of both marketing and public relations needs).
- 2) Include a narrative of your strategy for market research, assessment, and analysis efforts proposed for WISHIN's services.
- 3) Address potential public awareness campaign efforts targeting patients about WISHIN, WISHIN's services and HIE.
- 4) Include potential educational support (collateral, etc.) for physicians, clinics, and hospitals to share with patients.
- 5) A description of your firm's experience and success in developing and implementing marketing campaigns in the Wisconsin health care market. Include specific outcomes wherever possible.
- 6) A description of your firm's history, number of employees, billing policies and terms, and the services offered by your firm.
- 7) Resumes and biographical information for the personnel who you propose to assign to the WISHIN project and a staffing plan that outlines what proposed activities would be implemented by WISHIN staff and by your firm.
- 8) Samples of work done for other clients, particularly in the Wisconsin health care market, and campaigns designed to affect behavior change.
- 9) Provide the names, addresses, and phone numbers of at least three companies with whom you have transacted similar business in the last 12 months that can serve as references for your firm's work. You must include contact names of people who can talk knowledgeably about your firm's performance.
- 10) A proposed timeline for completing work on the WISHIN campaign.
- 11) Proposed prices, including your firm's flat fee or hourly rate.
- 12) Information about your firm and any sub-contractors you anticipate using for this contract, including the company name and type or organization as well as the names, addresses and phone numbers of principal officers and the project/program leader. References must be provided for all sub-contractors.
- 13) A detailed list of all materials and enclosures being sent in the proposal.
- 14) Any other statements you wish to convey to WISHIN.



DELIVERABLES

At a minimum the selected firm will deliver the following to WISHIN:

- A market research report with findings related to WISHIN's service offerings. The contractor will present the findings in person to WISHIN.
- An implementation plan with prioritized initiatives, timelines, tool kits, and process documentation.
- A marketing plan (to support WISHIN's service launch) that contains the strategies to effectively deliver the targeted messages identified.
- Creative materials (tool kit) to deliver the selected messages to target audiences. The creative materials will include print collateral and other materials proposed by your firm (video, etc.) to be used by WISHIN, WISHIN stakeholders, and others as deemed appropriate by WISHIN.
- Develop and track a set of metrics to measure and evaluate campaign effectiveness, including a process for gathering necessary data and analyzing campaign results.

PROPOSAL FORMAT REQUIREMENTS

Proposals must be provided in both electronic and hard-copy format, as follows:

- An electronic copy of the proposal must be submitted via email to the single point of contact noted above. Electronic versions must be submitted in Microsoft Word (.doc or .docx) or Adobe Portable Document Format (.pdf).
- Hard-copy proposals must be submitted by mail to the address noted above. Proposers must send three (3) identical printed copies of the proposal.

Both electronic and hard-copy proposals must be single-spaced with not less than 11-point font. Your organization's name must be included on each page of your proposal and on any other information you are submitting. All attachments must be clearly labeled.

NON-RESPONSIVE PROPOSALS

Read all instructions carefully. If you do not comply with any part of this RFP, WISHIN may, at its sole option, reject your proposal as non-responsive. WISHIN reserves the right to disregard minor irregularities contained in any proposal.



RFP AMENDMENTS

WISHIN reserves the right to amend this RFP. WISHIN will post any amendments to the RFP in the vendor section of the WISHIN web site at www.wishin.org.

GENERAL CONDITIONS

1. The release of this RFP does not constitute an acceptance of any offer, nor does it in any way obligate WISHIN to execute a contract with any bidder. WISHIN reserves the right to accept, reject or negotiate any or all bids received in response to this request, to negotiate with all qualified sources, or to cancel, reject, alter, modify or amend in part, or in its entirety, this RFP, if to do so is in the best interest of WISHIN.
2. WISHIN will not pay for any of the information requested in this RFP nor will WISHIN be liable for any bidder's costs associated with the preparation of proposals or negotiation of a contract.
3. All proposals shall constitute a binding irrevocable offer for ninety (90) days following the proposal deadline. Proposals may not be withdrawn on or after the proposal deadline.
4. All proposals, in their entirety, will become the property of WISHIN upon submission and will not be returned. WISHIN may use the proposals as a basis for negotiation of the final contract.
5. In submitting a proposal, the bidder certifies:
 - No gratuities (in the form of entertainment, gifts, or otherwise) were offered or given by the bidder (or an agent or representative of the bidder) to any officer, employee or representative of WISHIN with the objective of securing the contract or favorable treatment in this RFP process.
 - The prices in the proposal have been arrived at independently without consultation, communication or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other bidder or with any competition; and unless otherwise required by law, the prices that have been quoted in the proposal have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to award to any other bidder or to any competition; and no attempt has been made by the bidder to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
6. Each person signing a proposal must certify that he/she has the legal authority to do so on behalf of the bidding organization and that, by submitting the proposal, is



binding the bidding organization for the services and price being offered in the proposal.

7. The successful bidder must sign WISHIN's contract that, among other things, will:

- Incorporate the requirements of this RFP and permit no exceptions other than as expressly agreed to by WISHIN in the contract;
- Have the successful bidder agree that its services will be provided by qualified and appropriately experienced personnel so as to accomplish the tasks set forth in this RFP and according to the schedule and costs set forth in the bidder's response;
- Require the bidder to strictly comply with all federal and Wisconsin law applicable to the services, deliverables and WISHIN's status as a recipient of federal grant funds, including the requirements of 45 CFR 74.48; and
- Require that all deliverables be owned by WISHIN and, as applicable, be works made for hire, and that good title to the deliverables be transferred to WISHIN free of any liens, claims and other encumbrances.

BASIS FOR CONTRACT AWARD

All proposals meeting the requirements will be evaluated based on the categories noted in the table below. Percentages represent the weighting each category will have in the overall scoring of the proposals.

Category	Percentage
Project work plan, methodology and deliverables	30%
Project cost	30%
Expertise in the Wisconsin health care market	20%
Qualifications and relevant experience	10%
References from similar projects	10%

RFP finalists will be asked to make a presentation of their proposal to the WISHIN team at a time to be determined. If a contract is awarded, the award will be made to a financially responsible bidder whose proposal conforms to the requirements of this RFP and which is most advantageous to WISHIN with quality, price and other factors considered.