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## REQUEST FOR PROPOSAL

### Strategic Planning Technical Assistance to Support the Sustainability of the Patient-Centered Primary Care Institute

Issued by:  
Oregon Health Care Quality Corporation  
520 SW 6th Ave, Suite 830  
Portland, OR 97204

June 6, 2013

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## **About the Project**

Oregon Health Care Quality Corporation (Quality Corp) is launching a strategic planning process to focus the direction and financial sustainability of the Patient-Centered Primary Care Institute (PCPCI), a key project supporting Oregon's health care transformation efforts.

The contractor selected for this project will facilitate a strategic planning process to inform the Institute's programming priorities. The PCPCI received initial funding for development from the Oregon Health Authority (OHA) and Northwest Health Foundation (NWHF). The goal is to develop a strategic plan and business model to ensure sustainability of the Institute beyond the duration of the initial funding. The timeframe for this work is July – October 2013.

Components of the strategic planning process include:

- Conducting targeted interviews of stakeholders who have participated in early PCPCI programming for assessment of Institute work to date; this may include individuals involved with planning or delivery of programming as well as program participants
- Conducting focus groups with providers, clinics, medical groups, health plans and CCOs to develop potential programming and funding options
- Developing an environmental scan to identify key opportunities, alignments and barriers for the Institute
- Facilitating a planning retreat to include Expert Oversight Panel members and other key participants to review and provide input on the intermediate progress, outcomes, financing options and overall direction of the Institute
- Developing consensus around revised mission and vision, and prioritizing key strategies and critical success factors for the successful evolution of the Institute
- Developing a plan for Governance structure evolution from two original primary funders to multiple community partners and sponsors
- Drafting a five-year strategic business plan and model for the Institute
- Establishing a process for evaluating, reporting and updating strategic plan
- Planning template to be used for the development of key messaging and promotional materials

## **Institute Overview**

### **History**

During the 2009 legislative session, the Oregon Legislature enacted House Bill 2009, which created the Oregon Health Authority (OHA) and established a Patient-Centered Primary Care Home (PCPCH) program within the Office for Oregon Health Policy and Research (OHPR). The goals of the program are to identify and measure PCPCHs, promote their development, and encourage populations covered by the OHA to receive care in this new model. The PCPCH program now administers the application,

recognition, and verification process for practices applying to become recognized PCPCHs. The program is also working with stakeholders across Oregon to support adoption of the PCPCH model.

In its 2010 Action Plan for Health, the Oregon Health Policy Board charged the OHA with providing access to patient-centered primary care for all of its covered lives beginning in 2011 (including Medicaid, state employees, and Oregon educators) and for 75% of all Oregonians by 2015. As part of its work toward meeting this goal, OHA partnered with the Northwest Health Foundation (NWHF) to convene a diverse group of task force members, including clinicians, patients, public health officials, and healthcare delivery technical experts, to provide recommendations for an approach to support broad implementation of the PCPCH model across Oregon. The task force produced 16 general recommendations with over 70 specific strategies for achieving them, and prioritized the recommendations based on what is most essential for rapid PCPCH implementation across Oregon over the next few years. The top priority identified by the task force was to build on the expertise, technical assistance, and best practices throughout Oregon by creating an Institute to convene and broker resources, create a centralized learning system, and provide technical assistance. The full task force report is available online:

[www.oregon.gov/oha/OHPR/healthreform/pcpch/docs/nwhf/pcpch\\_imp\\_tf\\_rpt\\_121311.pdf](http://www.oregon.gov/oha/OHPR/healthreform/pcpch/docs/nwhf/pcpch_imp_tf_rpt_121311.pdf).

The Oregon legislature passed Senate Bill 1580 related to healthcare transformation and Coordinated Care Organizations (CCOs), which has expedited the need and urgency for deploying PCPCH technical assistance to primary care practices in Oregon. OHA has obtained the services of Oregon Health Care Quality Corporation (Quality Corp) to establish the Institute to expand the capacity and quality of technical assistance resources available to primary care practices in Oregon. The funding for direct technical assistance for practices and the initial funding for the Patient-Centered Primary Care Institute (PCPCI or the Institute) comes from two sources: an OHA partnership with the Northwest Health Foundation (NWHF), and a federal grant from the Health Resources and Services Administration (HRSA) State Health Access Program intended to support a range of key projects related to health care reform.

### **Project Team Member Roles**

OHA and NWHF are the primary funders of this project and have awarded Quality Corp a 15-month contract to create the Institute.

The PCPCI Project Team and roles are as follows:

- **OHA/NWHF** — project funders and advisers
- **Quality Corp** — project design, management and oversight

- **Expert Oversight Panel** — appointed to guide the development of the Institute TA plan, selection of TA subcontractors and development of TA resource and services. This panel, along with OHA and Quality Corp project staff, will review submitted proposals and make recommendations for contracting to the project team.

## About the Institute

The Institute was successfully launched in September 2012 and a wide variety of activities are occurring statewide. The Institute is guided by an Expert Oversight Panel composed of practicing providers, behavioral health experts, public and private health system representatives, and other community stakeholders. The Panel assists in the development of all components of the Institute and approves key project decisions, addresses barriers and guides the development of the Institute's strategic plan and business model. In addition to the Expert Oversight Panel, the Institute routinely works with six technical assistance (TA) organizations to deliver support to practices through collaborative learning, practice facilitation and web-based resources.

The Patient-Centered Primary Care Institute brings together technical experts, health care providers and staff, patient advisors, policymakers, academic centers and others to gather and share valuable practice transformation knowledge and resources. The Institute connects Oregon practices in all stages of primary care home transformation – from those looking to begin the process to those already recognized as primary care homes – to a broad array of technical assistance.

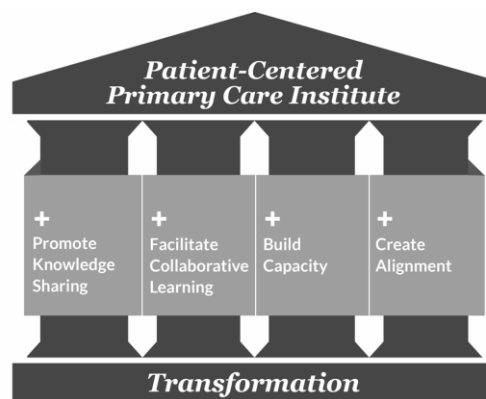
The Institute helps practices meet the requirements for the Oregon Health Authority's Patient-Centered Primary Care Home recognition. The Institute also helps practices move beyond the checklist to realize the Triple Aim outcomes of a healthy population, extraordinary patient care and reasonable costs.

### Key Objectives

**Promote knowledge sharing** through easy access to tools, resources, online learning, and best practice information

**Facilitate collaborative learning** using a network of technical assistance providers who provide face-to-face learning and practice coaching to select practices

**Build capacity** for ongoing primary care transformation by offering opportunities for technical assistance providers to collaborate and deploy resources collectively



**Create alignment** by coordinating efforts with other initiatives in Oregon to leverage resources, maximize benefits for practices and accelerate transformation

Visit [www.pcpqi.org](http://www.pcpqi.org) for more information about the Institute.

## Proposal Guidelines

### Schedule for submission, review, award

This is an open and competitive process.

The table below summarizes the RFP schedule:

RFP Announcement	Proposal Submission Due Date	Contract Award
June 10, 2013	June 24, 2013	July 3, 2013

- This RFP is dated June 10, 2013. Additional copies of this RFP are available at <http://www.pcpqi.org/news/institute-announcements>.
- Proposals are due no later than **5:00pm PDT, Friday, June 24<sup>th</sup>**
- Deliver proposals **via email** to the attention of:  
  
Mylia Christensen, Executive Director  
Oregon Health Care Quality Corporation  
520 SW 6th Ave, Suite 830  
Portland, OR 97204  
Phone: 503-241-3571  
**Email: Mylia.Christensen@Q-Corp.org**
- Proposals will be reviewed immediately thereafter and selected successful contractors will be announced beginning July 3<sup>rd</sup>.
- Negotiations will begin immediately with the selected contractor and will be completed by July 10, 2013.

### Instructions for RFP response

- The proposal submission should be a single electronic submission.

- Please use fonts no smaller than 10pt. Please limit your submission for Section IV. Bid Response Requirements to 10 pages.
- The submitted proposal consists of the following parts:
  - Title page: “Strategic Planning Technical Assistance to Support the Implementation of a Patient-Centered Primary Care Institute,” your organization name, address, telephone number, fax number, email address and primary contact person
  - Cover letter: Signed by a person(s) duly authorized to sign on behalf of the organization (1 page)
  - Bid Response Requirements, including budget (10 page limit)
- All inquiries about this proposal should be directed, via email, to:

Mylia Christensen, Executive Director  
 Oregon Health Care Quality Corporation  
 520 SW 6th Ave, Suite 830  
 Portland, OR 97204  
 Phone: 503-241-3571  
**Email: Mylia.Christensen@Q-Corp.org**

## **Bid Response Requirements**

### Organization Description

Please provide a brief description of your organization/individual expertise and experience as it relates to facilitating strategic planning, especially in primary care home/medical home initiatives or similar health care projects.

### Strategic Planning TA Services Description

Describe the strategic planning process you would propose for the Institute. Provide an outline of the process and approach, as well as key milestones. Please also describe how you would determine which financial sustainability options to recommend to Institute leadership, including how you would gather information to support your recommendations.

### Experience

Describe past, relevant projects undertaken by your organization/individual, in particular those that incorporated a diverse group of statewide stakeholders.

### Staff

Please provide a description of proposed staff, availability, and descriptions of expertise specific to strategic planning.

### Evaluation

Describe your organization's/individual's approach to evaluating the final strategic plan and the effectiveness of the planning process.

### References

Please provide the name, phone number and email address for references from three previous clients for similar projects.

### Budget

Provide a budget to include proposed staff and hourly rates by type of TA mode delivered. The current budgeted amount for this activity is a range from \$5000 – \$7500.

### **Evaluation Criteria**

Proposals submitted by the deadline will be evaluated based on the following criteria:

- Suitability of proposal—does the proposal accurately and adequately meet the strategic planning needs requested?
- Past experience in health care strategic planning —does the applicant have sufficient past experience as evidenced by previous projects and client references?
- Value/pricing structure—is the proposed total cost and staff rate structure commensurate with the value offered by the applicant?
- Commitment to collaborative, multi-stakeholder process—is there sufficient evidence of applicant's success working with a variety of players in diverse settings and developing consensus around a strategic process and plan?
- Past experience in planning and development of entrepreneurial business model that resulted in successful programming and sustainability.
- Commitment to PCPCH transformation—does the applicant have relevant experience in health care transformation strategic planning?