MONTANA UTILIZATION AND TREATMENT GUIDELINES
RFP#10-1965L

EVALUATION SUMMARY
OF PROPOSALS AND PRESENTATIONS

REED GROUP, Ltd
ACOEM

JULY 20, 2010

RFP SECTION TITLES	Possible Points	REED GROUP	ACOEM
PASS/FAIL REQUIREMENTS			
References	P/F	P	p
FIRM QUALIFICATIONS AND EXPERIENCE			
A. Firm Qualifications and Experience	100	85	90
5% of points for a possible 100 points	100	85	90
EMPLOYEE QUALIFICATIONS AND EXPERIENCE			
A. Project Manager Qualifications & Experience	150	110	100
B. Medical Doctor Qualifications & Experience	150	135	135
C. Staff Qualifications & Experience	100	75	65
20% of points for a possible 400 points	400	320	300
METHOD OF PROVIDING SERVICES			
A. Proof of Concept - Information Development			
A. Authorization	50	40	40
B. Guideline Development	200	167	160
C. Medical Coding	150	130	105
B. Proof of Concept - Delivery System Development			
A. Template Compliance	50	50	35
B. Home Page Functionality	100	75	89
C. Guidelines Interface	150	134	120
D. Additional Features	100	60	70
C. Project Plan			
A. Project Charter/Communication	50	34	43
B. Scope	100	50	89
C. Time/Resources/Cost	100	50	85
D. Risk/Quality	50	39	40
55% of points for a possible 1100 points	1100	829	876
PROPOSAL SCORING - SUBTOTAL BEFORE COST	1600	1,234	1,266
TOTAL COST SCORE	400	341	400

TIER TWO SCORING - 500 POINTS

PRESENTATION & INTERVIEW			
A. Project Plan	100	75	90
B. Validity & Substance	250	215	215
C. Quality of Presentation	150	125	130

RFP SECTION TITLES	Possible Points	REED GROUP	ACOEM
[redacted]			

REED GROUP	Possible Points	Anne Wolfinger	Jerry Keck	Keith Messmer	Bruce Chamberlain	Con-sensus	Comments
PASS/FAIL REQUIREMENTS							
References	P/F	P	P	P	P	P	
FIRM QUALIFICATIONS AND EXPERIENCE							
A. Firm Qualifications and Experience	100	80	85	85	85	85	Jerry noted experience and parterning with ACOEM over a web friendly. Multiple state experience. Relatively new to treatment guidelines. Partnered in 2005. 2009 went to web platform.
5% of points for a possible 100 points	100	80	85	85	85	85	
EMPLOYEE QUALIFICATIONS AND EXPERIENCE							
A. Project Manager Qualifications & Experience	150	105	120	110	125	110	10 years of managing updates. No certification of project management. Would like more education background. Lack of additional information. Management vs. working independently. No documentation of project management experience demonstrated.
B. Medical Doctor Qualifications & Experience	150	135	135	140	125	135	Would like more education or experience - detail. Strength of Dr. Meuller. Other doctor wasn't in plan anywere else. Combination of doctors helpful. Preferred if both doctors were in plan. Must base scored on details - plan had lack of details on roles in process. Dr. T seems familiar with guidelines - consulting with Dr. Mueller would be a good combination. Consensus reached upon discussion: Dt. is an ortho surgeon and chair of Med. adv. board; and Dr. M is occ. med. physcian with experience developing CO guidelines.

REED GROUP	Possible Points	Anne Wolfinger	Jerry Keck	Keith Messmer	Bruce Chamberlain	Con-sensus	Comments
C. Staff Qualifications & Experience	100	75	90	75	85	75	Min. descriptions: no education; no documentation of experience. Most personnel not in project plan. Saw roles and responsibilities - may have scored too high. Not enough detailed documentation. Perhaps a "high fair?" No, "medium fair."
20% of points for a possible 400 points	400	315	345	325	335	320	
METHOD OF PROVIDING SERVICES							
A. Proof of Concept - Information Development							
A. Authorization	50	44	40	40	39	40	Authorization of eye chapter, but other body parts not autorized. Would this require a separate agreement/cost? Dealing with different editions. Glad to see there was an actual agreement, but concerns. What if they can't come to agreement on other parts? When can we confirm authorization? Jill informed committee that contract negotiation is the opportunity. Guidelines were suppose to be comprehensive per the RFP. Guideline development different from authorization.

REED GROUP	Possible Points	Anne Wolfinger	Jerry Keck	Keith Messmer	Bruce Chamberlain	Con-sensus	Comments
B. Guideline Development	200	182	160	160	160	167	CO formatting was slightly modified but acceptable. Addition of CPT codes for only recommended procedures. Icons were good.Excerpt referred to an external site. Impressed by cross references. Can't dismiss chapters that are not talked about in proposal. Criteria states addition of other areas not in CO guidelines. Example does not address fuller narrative of a complete set of guidelines. Page 52 mentioned ACOEM - not seemless? Simply asked for low-back - didn't ask for examples of other chapter titles. Could have described more in their narrative. Concern over introduction - may have removed too much; could have added their own.
C. Medical Coding	150	120	120	130	105	130	Coding for auto approval not in proposal. Showed us how they would do it, did not need to be complete. Good examples of inclusion of CPT codes generally.
B. Proof of Concept - Delivery System Development							
A. Template Compliance	50	44	50	44	44	50	Compliant on all examples. Concern over the size of the screenshot. Would like it all on one page not scroll-down. User could control whether it is scroll-down or not. Looks like what was desired all around.

REED GROUP	Possible Points	Anne Wolfinger	Jerry Keck	Keith Messmer	Bruce Chamberlain	Con-sensus	Comments
B. Home Page Functionality	100	0	75	70	75	75	Committee did not see a homepage - only saw example of a chapter. Simply shows a search box - didn't provide search functionality asked in RFP. Have to project a lot from two screen shots - would have liked more. Demonstrated links asked in RFP. Assertions without screenshots. Concept demonstrates ability. Based on screenshot: pull-down menu, MCA/ARM, admin., search (sub-standard).
C. Guidelines Interface	150	135	150	134	130	134	Everything was there but without detail or example. Concern over search function: no screenshot of search inputs.
D. Additional Features	100	50	50	50	80	60	Version specifications: how will it display MT guidelines by default, no screenshot, simply restated RFP for version control. Description not enough. Full credit on CPT codes. Assertion without demonstration unacceptable.
C. Project Plan							
A. Project Charter/Communication	50	35	35	30	39	34	Incomplete: purpose was off; roles and responsibilities - confusion over PM and content; where's the rest of the staff. Communication: need single point of contact; no written reports; weekly status meeting - ok, but wanted more. No milestones listed. No approval process outlined. Dr. T not mentioned.
B. Scope	100	40	50	60	60	50	No work breakdown structure or activity estimates.

REED GROUP	Possible Points	Anne Wolfinger	Jerry Keck	Keith Messmer	Bruce Chamberlain	Con-sensus	Comments
C. Time/Resources/Cost	100	30	60	70	70	50	Not sure they could do everything at the same time. Transition plan weak - counting on staff not to leave. Nothing about cost management. Expected this section to tell us exactly how things would be done - expectations not met. Only general assertion about resources. Oct. 18 is the defined delivery date - proposal asks that delivery date be defined. No activity sequencing. No quantifying or scheduling as to what needs to happen - project expectation is an agressive timeline. Did have long-term relationship with contractors for possible assistance.
D. Risk/Quality	50	39	40	40	39	39	Time is primary risk: not addressed. Proposed technical/maintenance risks weren't explained well enough to be understood by lay people.
55% of points for a possible 1100 points	1100	719	830	828	841	829	
PROPOSAL SCORING - SUBTOTAL BEFORE COST	1,600	1,114	1,260	1,238	1,261	1,234	

TIER TWO SCORING - 500 POINTS

PRESENTATION & INTERVIEW							
A. Project Plan	100	65	50	85	89	75	Plan: points partially addressed, lacked clear plan. Time: Not detailed, but some items already done, fill-in of gaps unclear. Added Value: Outcome measures, rights to CPT descriptions.
B. Validity & Substance	250	190	230	225	210	215	Tech. Requirments: functionality met all requirements. Hosting: challenges to state hosting.

REED GROUP	Possible Points	Anne Wolfinger	Jerry Keck	Keith Messmer	Bruce Chamberlain	Con-sensus	Comments
C. Quality of Presentation	150	115	125	125	120	125	Pros: well organized, prototype showed MT pages, answered questions directly, responsive to things we may be looking for. Cons: disconnect between presenters, focused on existing product (MDGuidelines) - not Montana specific, plan presentation not well organized.
SCORING TOTAL PRESENTATION & INTERVIEW	500	370	405	435	419	418	

ACOEM	Possible Points	Anne Wolfinger	Jerry Keck	Keith Messmer	Bruce Chamberlain	Con-sensus	Comments
PASS/FAIL REQUIREMENTS							
References	P/F	p	p	p	p	p	
FIRM QUALIFICATIONS AND EXPERIENCE							
A. Firm Qualifications and Experience	100	70	90	90	90	90	Guidelines since 1997. Can put everything on same database. Primary business is guideline development. No org. structure, size, or employees. Clarified that ACOEM is a society. Staff is listed.
5% of points for a possible 100 points	100	70	90	90	90	90	
EMPLOYEE QUALIFICATIONS AND EXPERIENCE							
A. Project Manager Qualifications & Experience	150	50	125	100	95	100	No length of tenure or experience listed. No detailed statement regarding guideline management. Some background.
B. Medical Doctor Qualifications & Experience	150	135	135	135	150	135	Exceptional qualifications: occ. Med, developed CO guidelines. Consensus based on consistent scoring of Dr. M.
C. Staff Qualifications & Experience	100	50	100	50	50	65	Details lacking: qualifications, years of service. Strong education but lack details on experience.
20% of points for a possible 400 points	400	235	360	285	295	300	
METHOD OF PROVIDING SERVICES							
A. Proof of Concept - Information Development							
A. Authorization	50	40	40	40	50	40	Authorized material below expectations. Letter to other vendor had little relevance to proposal.
B. Guideline Development	200	160	160	165	160	160	Followed CO format. They added procedures from ACOEM. Introduction weak. No bibliography. Don't address non-CO areas - need clarification. Extensive supplemental treatments for low-back.

ACOEM	Possible Points	Anne Wolfinger	Jerry Keck	Keith Messmer	Bruce Chamberlain	Con-sensus	Comments
C. Medical Coding	150	59	105	110	105	105	No specific explanation - only evidence of ICD9 Codes in screen-shots. No explanation of automatic payments. No sample of CPT coding in low-back chapter.
B. Proof of Concept - Delivery System Development							
A. Template Compliance	50	25	25	35	30	35	Header minimally compliant. Menu compliant. Footer unknown. Minimally meets requirements.
B. Home Page Functionality	100	80	90	89	90	89	Meets all requirements except generating reports. Admin functions were good. Search engine unclear about weighted results.
C. Guidelines Interface	150	122	105	110	100	120	Assertions/promises but examples are weak. Footer not shown. Included tree-based TOC, main window, search shown, print icon. Showed printer version of guidelines.
D. Additional Features	100	60	70	89	89	70	Versioning: example good and well explained. CPT Codes: no display of automatic approval.
C. Project Plan							
A. Project Charter/Communication	50	40	50	40	35	43	Accurate purpose. Plan plan inconsistent with team members and roles. Milestones show understanding of requirements. Communication plan was minimally adequate. Addressed approval process. Performance through monthly written status reports.
B. Scope	100	80	100	75	85	89	Activities estimates listed. Reasonable work breakdown structure.
C. Time/Resources/Cost	100	80	85	85	85	85	Addressed timeline, resource availability, transition, back-ups, cost estimate breakdown, content development breakdown and cost. Personnel inconsistency. Costs tracked and reported.
D. Risk/Quality	50	25	40	30	39	40	Generally well addressed.Evidence of quality measures and testing.

ACOEM	Possible Points	Anne Wolfinger	Jerry Keck	Keith Messmer	Bruce Chamberlain	Con-sensus	Comments
55% of points for a possible 1100 points	1100	771	870	868	868	876	
PROPOSAL SCORING - SUBTOTAL BEFORE COST	1,600	1,076	1,320	1,243	1,253	1,266	

TIER TWO SCORING - 500 POINTS

PRESENTATION & INTERVIEW							
A. Project Plan	100	90	95	87	89	90	Addressed everything, level of detail for each chapter was well thought out, confidence in plan, formal project management, recognition of scope, time and risk addressed. Concern over this project and roll-out of ACOEM 3rd Ed. - may dovetail with this project.
B. Validity & Substance	250	210	235	210	210	215	Every piece of tech. addressed. Guideline management demonstrated better functionality. Search engine reflected what we asked for. Template missing, look and feel would have been nice to see. Reporting not addressed.
C. Quality of Presentation	150	134	135	115	125	130	Pros: clarity, professional, well-organized, listened and answered questions well. Cons: slides were unreadable, speed of presentation too fast.
SCORING TOTAL - PRESENTATION & INTERVIEW	500	434	465	412	424	435	

Awarding of Points Based on Offeror Cost Proposal

Cost Proposal (evaluated using ratio method: 400 Possible Points)

	Cost Proposal	Lowest Cost Proposal	Points Assigned	Percent of Points Awarded
Reed Group	150,000	128,000	341	85%
ACOEM	128,000	128,000	400	100%