

<p align="center">REQUEST FOR BID # 2011-002</p> <p align="center">Health Information/Health Information Exchange</p> <p align="center">Consulting Services to fulfill Project Management and Technical Lead Positions</p> <p align="center">THIS IS NOT AN ORDER</p>	<p align="center">National Institute for Medical Informatics (NIMI) 1009 W. Glen Oaks Lane Suite 101 Mequon, WI 53092</p>								
<p align="center">Bid Due Date</p> <p align="center">Ongoing</p>	<p align="center">All questions relating to this Request For Bid must be submitted in writing to:</p> <p align="center">Kim R. Pemble, President, NIMI kpemble@whie.org 262-240-0198 x102</p>								
<p align="center">Calendar of Events</p> <table border="0"> <tr> <td>December 7, 2011</td> <td>RFB Released</td> </tr> <tr> <td>December 14, 2011</td> <td>Deadline for submission of questions to NIMI</td> </tr> <tr> <td>December 14 and ongoing</td> <td>Proposals begin to be accepted</td> </tr> </table> <p>This will be an ongoing procurement for period December 2011 – January 2014, for resources as needed during this time period.</p>				December 7, 2011	RFB Released	December 14, 2011	Deadline for submission of questions to NIMI	December 14 and ongoing	Proposals begin to be accepted
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<p>Bidder Name and Address (must be completed)</p>									
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<p>ACKNOWLEDGEMENT OF ANY ADDENDA and/or REVISIONS: In signing this Bid, Bidder acknowledges and affirms that its Bid complies with all terms, conditions and specifications of this RFB and any addenda, appendices or revisions thereto. If awarded a contract, Bidder will comply with all terms of its Bid and all terms, conditions and specifications of this RFB and any addenda or revisions thereto.</p> <p>DEBARMENT AND SUSPENSION: In signing this Bid, Bidder acknowledges it has not been suspended, debarred, declared ineligible or voluntarily excluded from eligibility by any Federal department or agency.</p> <p>NON-COLLUSION: In signing this Bid, Bidder certifies it has not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a Bid; that this Bid has been independently arrived at without collusion with any other Bidder, competitor or potential competitor; that this Bid has not been knowingly disclosed prior to the opening of Bids to any other Bidder or competitor; that the above statement is accurate under penalty of perjury.</p>									
<p>Name of Authorized Company Representative (Type or Print)</p>	<p>Title</p>	<p>Date</p>							
<p>Signature of Authorized Company Representative Named Above</p>	<p>Phone</p>	<p>Fax</p>	<p>Email</p>						

CHECKLIST FOR SUBMITTING A BID

Understanding the Request for Bid (RFB)

1. Thoroughly read and review this Request for Bids and all attachments, appendices, addenda, and/or revisions.
2. Submit any written questions to the Procurement Manager by the deadline provided in the Calendar of Events.
3. Determine if NIMI will hold a Bidders' meeting (see Section 3.7) and check the date provided in the Calendar of Events.
4. Know when and where the Bid is to be delivered.

Completing Your Bid

1. Complete the Cost Sheet (7.1) provided with the RFB.
2. Complete the Vendor Information Form provided with the RFB.
3. Complete the Vendor Reference Form provided with the RFB.
4. Complete and sign the Request for Bid sheet provided as the cover of this RFB package.

Submitting Your Bid

1. Prepare one set of original documents marked "Original":
 - a. Signed Request for Bid Sheet (RFB cover page)
 - b. Vendor Information Form (Attachment 1)
 - c. Vendor Reference Form (Attachment 2)
 - d. Cost Sheet(s) (Attachment 3)
 - e. Additional Information See Section 8. for details
2. For Bids submitted by USPS or other delivery service, place the original documents in a sealed package (envelope or box). Ensure that the following information is clearly marked on the outside of the envelope or box:
 - a. Bidder's Name and Address
 - b. Request for Bid Title (See upper left hand box of RFB cover page)
 - c. Request for Bid Number (See upper left hand box of RFB cover page)
 - d. Bid Due Date (See upper left hand box of RFB cover page and Calendar of Events)
 - e. Include one additional copy of all elements of the full package with the submission
 - f. Ensure the sealed package is delivered to the correct address before the Bid Due Date and time in the Calendar of Events.
3. For Bids submitted by e-mail, ensure that the following information is clearly marked in the body of the e-mail, separate from any attachments.
 - a. E-Mail header indicates Request for Bid Title and Number.
 - b. Bidder's Name and Address
 - c. Request for Bid Title (See upper left hand box of RFB cover page)
 - d. Request for Bid Number (See upper left hand box of RFB cover page)
 - e. Bid Due Date (See upper left hand box of RFB cover page and Calendar of Events)
 - f. Ensure the e-mail is delivered to the correct address before the Bid Due Date and time in the Calendar of Events.
4. No faxed Bid submission will be accepted.

If your organization is chosen for an award:

1. Be prepared to provide any documents—such as certificates of insurance, licenses, contractor credentials, HIPAA training validation, IRS Form W-9 (Request for Taxpayer Identification Number) or Affirmative Action plan/exemption—as required by NIMI.

1.1 Definitions

Words and terms in this RFB shall be given their ordinary and usual meanings, and all meanings shall be applicable to the singular and plural forms of the words and terms. For the purposes of this RFB, the following words and terms shall have the meanings indicated:

“Bid” or “Bid Document” - means the complete response of a Bidder, including all required documentation, submitted on the approved forms and setting forth the Bidder’s prices for providing the commodities and/or services described in the RFB.

“Bidder” - means any individual, company, corporation or other entity that responds to this RFB.

“Calendar of Events” - means the official schedule of events, deadlines and dates shown on the cover of this RFB.

“Connect” Refers to the Connect project of ONC.

“Contract” - means a contract that will be awarded to a Bidder under this RFB.

“Contractor” or “Vendor” - means a Bidder that is awarded a Contract under this RFB.

“DHS” means WI Department of Health Services

“Direct” Refers to the Direct project of ONC

“DNS” refers to the Internet Domain Name Service

“HL7” refers to the Health Level Seven protocol for integration

“NIMI” means National Institute of Medical Informatics, the parent of WHIE

“ONC” means Office of the National Coordinator for Health Information Technology

“PHI” – Protected Health Information, any information that allows for records or data to be uniquely identified to an individual.

“Procurement Manager” - means the person identified on the cover of this RFB who has been designated by NIMI to manage this RFB.

“Request for Bid (RFB)” - means this document including appendices, addenda, revisions and/or attachments.

“SOP” means WI HIT Strategic and Operational Plan as approved by ONC.

“WHIE” means Wisconsin Health Information Exchange

“WISHIN” means WI Statewide Health Information Network

1.2 Scope

The purpose of this Request for Bids (RFB) is to provide interested parties with information needed to prepare and submit a Bid for the following:

NIMI is seeking standing price sheets for the period of December 2011 – December 2013 related to establishing resources as noted for:

- a. Project Manager(s) related to the various project activities of NIMI in support of WISHIN. These include, however are not limited to, demonstration projects related to Direct Secure Messaging and initial projects for Phase 2 HIE.
- b. Technical resources to be involved with various aspects of HIE, including but not limited to implementation/integration work, analytics reporting and other tasks.
- c. Support Services for client facing trouble shooting, education and related activities.
- d. Office Manager
- e. Clerical Support.

Note that this is not a State of Wisconsin RFB or procurement, nor will the contracting be through the State of Wisconsin. NIMI is an independent nonprofit organization and is seeking services in support of its obligations to WISHIN, also a nonprofit organization. Funds related to this request are through the American Recovery and Reinvestment Act, HITECH, the Funding Opportunity Announcement and State HIE Cooperative Agreement Program and contracts will reflect such to the extent applicable.

NIMI intends to use the results of this process to award contract(s) for consulting services related to

various projects of Direct and HIE Services in Wisconsin.

1.3 Procuring Organization

NIMI is a nonprofit regional health information organization (RHIO) that operates the WI Health Information Exchange (WHIE) and provides technical management and operation services to WISHIN in support of various phases of the Statewide Health Information Network (SHIN) implementation. NIMI serves as the state-level Health Information Service Provider (HISP) for the duration of any agreement arising from this RFB. NIMI provides services in Wisconsin and other states related to HIE planning and implementation services.

2. CONTRACT INFORMATION

2.1 Contract Term

Contract discussions will be undertaken with the selected Bidder(s) as soon as possible.

3. BID PROCEDURES AND INSTRUCTIONS

3.1 Reasonable Accommodations

NIMI will provide reasonable accommodations, including the provision of informational material in an alternative format, for individuals with disabilities upon request. If you need information in an alternative format, contact the Procurement Manager.

3.2 Bid Contents and Delivery Requirements

Bidders shall submit an original Bid document by the Initial Bid Due Date in the Calendar of Events to:

USPS/Mailing Address/Delivery in Person

Kim R. Pemble
NIMI
1009 W. Glen Oaks Lane Suite 101
Milwaukee, Wisconsin 53092

By e-mail to kpemble@whie.org, with a receipt data/time no later than the date and time noted in the RFB header for due data and time.

Mailed Bids must be packaged, sealed and show the following information on the outside of the package:

1. Bidder's Name and Address
2. Request for Bid Title (See upper left hand box of RFB cover page)
3. Request for Bid Number (See upper left hand box of RFB cover page)
4. Bid Due Date (See upper left hand box of RFB cover page and Calendar of Events)

Mailed Bids must be date and time stamped at the office indicated above on or before the date and time Bids are due. Late Bids shall be rejected. Receipt of a Bid by the mail system does not constitute receipt of a Bid by NIMI. Any Bid that is inadvertently opened as a result of not being properly and/or clearly marked shall be rejected. Bids must be submitted separately. Faxed Bids are not allowed and will not be accepted.

E-mailed Bids must indicate:

1. E-Mail header indicates Request for Bid Title and Number.
2. The Request for Bid Title and Number and full details on Bidder Name and Address are provided in the body of the message.
3. Attachments outlining the response will be provided in Word, Excel or PDF formats only. Responses should not be provided as text in the body of the message.

E-Mailed Bids must have receipt data and time stamp no later than the date and time of Bid receipt deadline. Late Bids shall be rejected. Bids should be e-mailed only to the address as identified in the address block earlier in this section. Bids that do not include appropriately formatted attachments will be rejected. Any Bid that is inadvertently opened as a result of not being properly and/or clearly marked shall be rejected. Bids must be submitted separately and may not be included with sample packages or other Bids. Faxed Bids are not allowed and will not be accepted..

3.3 Calendar of Events

The Calendar of Events provides important dates and times by which actions related to this RFB shall be completed. In the event that NIMI finds it necessary to change any of these dates and times, it will provide written notification of such changes per Section 3.4, Communication with Bidders.

3.4 Communication with Bidders

In the event it becomes necessary to make changes to the Calendar of Events, provide additional clarifying data or information, revise any part of this RFB, or provide a record of questions and answers, the Procurement Manager will send notification of these changes through the same conduit as the initial announcement or post the information on the WHIE Web site at <http://www.whie.org>.

3.5 Format of Bid

Bidders responding to this RFB must submit the following materials:

- a) **Signed Request for Bid Sheet:** The Bid must include the signed Request for Bid sheet provided as the cover of this RFB package. A Bid submitted in response to this RFB must be signed by the person in the Bidder's organization who is responsible for decisions regarding prices offered in the Bid or by a person who has been authorized in writing to act as agent for the person responsible for the decision on prices.
- b) **Vendor Information Form** (Attachment 1)
- c) **Vendor Reference Form** (Attachment 2)
- d) **Cost Sheet** Provide cost information on the Cost Sheet(s) included in this RFB. All costs for furnishing the commodities and/or services, as set forth in the terms and conditions of this RFB, must be included in the Bid. Please refer to Section 7.
- e) **Additional Information:** Please refer to Section 8. Additional Information Requirements, for a listing of required additional documents.

The checklist included with this RFB is provided for the convenience of the Bidder. The Bidder is not required to submit the checklist with its Bid package.

3.6 Questions

Questions concerning this RFB must be submitted in writing to the Procurement Manager on or before the Deadline for Submitting Written Questions provided in the Calendar of Events. Bidders are expected to raise any questions, exceptions or additions concerning the RFB document prior to this deadline. If a Bidder discovers any significant ambiguity, error, conflict, discrepancy, omission or other deficiency in this RFB, the Bidder must immediately notify the Procurement Manager and request modification or clarification of the RFB document. All questions will be recorded by NIMI. All questions and answers will be posted on the WHIE web site at <http://www.whie.org>.

3.7 Bidders' Meeting

There will be no Bidders meeting. See Section 3.6 for submission of any and all questions regarding the Bid.

3.8 Incurring Costs

NIMI is not liable for any cost incurred by a Bidder for responding to this RFB.

3.9 Contact with the NIMI

From the date of issuance of this RFB until a Letter of Intent to Award a Contract is issued, all contacts with the NIMI regarding this RFB shall be made only through the contact noted in the RFB template on the opening page of this RFB. Any information provided by a source other than the Procurement Manager shall be deemed unofficial and nonbinding. Violation of this condition may be considered sufficient cause for rejection of a Bid, irrespective of any other considerations.

3.10 News Releases

News releases pertaining to the RFB or to the acceptance, rejection or evaluation of Bids shall not be made without the prior written approval of NIMI.

4. BID ACCEPTANCE, VERIFICATION AND AWARD

4.1 Bid Opening

Bids will be opened at the NIMI Offices within one week after deadline for Bid submission.

4.2 Bid Review and Verification

NIMI shall review each Bid to verify that it meets all specified requirements in this RFB. This verification may include requesting reports on the Bidder's financial stability, conducting demonstrations of the Bidder's proposed products and/or service, and reviewing results of past awards to the Bidder by NIMI.

4.3 Bid Acceptance

Bids that do not comply with instructions contained in this RFB may be rejected by NIMI. NIMI reserves the right to waive a particular specification if no Bidder meets that specification. NIMI may request reports on a Bidder's financial stability. NIMI may reject a Bid if the Bidder is determined to have inadequate financial means to provide the product or service being bid. NIMI retains the right to accept or reject any or all Bids, or accept or reject any part of a Bid, deemed to be in the best interest of NIMI. NIMI shall be the sole judge as to compliance with the instructions contained in this RFB. Bids shall be firm for acceptance for sixty (60) days from date of Bid opening unless otherwise noted. A Bidder may withdraw its Bid at any time prior to the issuance of Intent to Award.

4.4 Method of Award

The award will be made in the best interest of the NIMI, as determined solely by NIMI, to the Lowest Responsible Bidder(s) that meet the requirements listed in this RFB.

4.5 Intent to Award a Contract

All Bidders that submit a Bid will be notified either by phone, in writing or e-mail of NIMI's decision regarding award resulting from review of the submitted Bids.

5. TECHNICAL PERFORMANCE REQUIREMENTS

5.1. All resources provided under this RFB will be assigned solely to this project during the term of December 2, 2011

the contract. Position outline for key positions are provided below.

- 5.2.** Project management candidate(s) proposed under this Bid will have as a minimum:
- a)** Have demonstrated expertise in technical project management, through large scale project work, with many and varied stakeholders. This may be demonstrated by having attained PMP or equivalent certification.
 - b)** Previous experience in the health care environment, particularly working with projects for Electronic Health Records or Health Information Exchange, including having an understanding of the current and evolving standards related to HIE and EHR is strongly preferred.
 - c)** Have demonstrated understanding of the evolving HIE goals of ONC, including but not limited to Direct, Connect, and the interaction with these services on a local level with existing HIE services, ePrescribing services, Laboratory Results Reporting Services, HL7 2.X, 3.X, Clinical Document architecture (CDA).
 - d)** Have demonstrated understanding of Public Health Services (e.g. Disease reporting, Syndromic Surveillance, Immunization reporting) as provided in Wisconsin and as referenced in the Meaningful Use Requirements.
 - e)** Have demonstrated understanding of the appropriate privacy and security requirements as outlined in HIPAA and applicable State and Federal legislation.
 - f)** Have demonstrated exceptional verbal and written communication skills.
- 5.3.** Technical Resource candidate(s) proposed under this Bid will have as a minimum:
- a)** Demonstrated understanding of EHR and HIE existing and evolving standards.
 - b)** Demonstrated understanding of the appropriate privacy and security requirements as outlined of HIPAA and applicable Wisconsin State and Federal legislation.
 - c)** Demonstrated knowledge and experience, of systems using the evolving HIE goals of ONC, including but not limited to Direct, Connect, and the interaction with these services on a local level with existing HIE services, ePrescribing services, Laboratory Results Reporting Services, HL7 2.X, 3.X, Clinical Document architecture (CDA).
 - d)** Demonstrated experience with various current network connectivity and communication protocols, sufficient to provide direction and support related to the establishment of a network interconnecting various health provider resources in Wisconsin.
 - e)** Demonstrated knowledge with certificate authority operations, including operation and management of PKI infrastructure.
 - f)** For database reporting/analytics work, demonstrated experience with SQL based database technologies and ability to understand and apply various schemas to operations and reporting functions.
 - g)** Knowledge and demonstrated experience with daily operations related to Domain Name Service protocols and standards.
 - h)** Knowledge and demonstrated experience with Virtual Private Network agents and tools, both hardware and software in nature which might be used in the implementation of a HIE.
 - i)** Demonstrated knowledge of various directory structures, including but not limited to active directory, as this may relate to HIE operations and support.
 - j)** Demonstrated exceptional verbal and written communication skills.
- 5.4.** Support Specialist candidate(s) proposed under this Bid will have as a minimum:
- a)** Demonstrated understanding of EHR and HIE existing and evolving standards.
 - b)** Demonstrated understanding of the appropriate privacy and security requirements as outlined of HIPAA and applicable Wisconsin State and Federal legislation.
 - c)** Demonstrated experience in providing technical and on-call support to clinical and business clients in a health care environment.
 - d)** Demonstrated experience in ensuring work meets or exceeds established Service Level

Agreements and ability to work in an environment where issues need to be effectively escalated as needed.

- e) Demonstrated experience in documenting support calls, resolution of problems, and applying information from such systems as a knowledge base in resolving new calls.
- f) Demonstrated experience in owning and/or assigning and following up on reported problems to ensure they are fully resolved and documented in a timely manner.
- g) Strong customer facing client support experience, including but not limited to onsite and remote installation and support services.
- h) Demonstrated ability to prepare and conduct end user education sessions.
- i) Demonstrated exceptional verbal and written communication skills, both in group and one on one settings.

5.5. NIMI reserves the right to interview candidate resources prior to placement and to request replacement of a resource upon no more than 14 days notice to the Bidder.

6. CONTRACTOR REQUIREMENTS

6.1. Invoices, Required Documentation and Payment

- a) The Contractor must ensure that monthly invoices are provided to NIMI for review and payment.
- b) NIMI shall make payment to the Contractor within thirty (30) days of receipt of a valid invoice, subject to acceptance of the work associated with the invoice as will be outlined on the contract.

6.2. Warranties and Intellectual Property

- a) Warranties and intellectual property requirements will be fully documented and mutually agreed to within the Contract resulting from this RFB.

6.3. Failure to Perform

- a) The Contract may be terminated for the Contractor's failure to comply with any of the specifications or conditions of the RFB or the Contract.
- b) If the Contractor fails to provide commodities or services at a level of capacity (either volume or quantity) or quality acceptable to NIMI, NIMI may, at its sole discretion, (1) direct a corrective action plan, (2) suspend the Contract pending resolution of quality problems or (3) terminate the Contract for cause.

6.4. Permits, Insurance and Other Requirements

- a) Following the Intent to Award notification, the Contractor must provide to NIMI its IRS Form W-9 (Request for Taxpayer Identification Number and Certification) and Affirmative Action plan/exemption.
- b) The Contractor must certify that all staff assigned under this RFB have received and continue to receive on an annual basis the appropriate and applicable HIPAA Privacy and Security education, including education in regards to other more restrictive Wisconsin Laws and Federal Laws (e.g. WI 51.30, Federal CFR 42).

7. COST INFORMATION

7.1. Bid Pricing

- a) The Bidder must complete the Cost Sheets (below)
- b) The Bidder must present its standard expense reimbursement rates including but not limited to:
 - a. Per Diem Rates if applicable
 - b. Maximum daily meal allowance
 - c. Mileage reimbursement rates, if different from that allowed by the IRS.

Resource	Hourly Rate	Comments
Project Manager		Exclusive of travel time, individual is not an employee of NIMI and Bidder organization will bear all responsibilities for benefits, and applicable payroll and taxes.
Technical		Exclusive of travel time, individual is not an employee of NIMI and Bidder organization will bear all responsibilities for benefits, and applicable payroll and taxes.
Support Specialist		Exclusive of travel time, individual is not an employee of NIMI and Bidder organization will bear all responsibilities for benefits, and applicable payroll and taxes.
Office Manager		Exclusive of travel time, individual is not an employee of NIMI and Bidder organization will bear all responsibilities for benefits, and applicable payroll and taxes.
Clerical Support		Exclusive of travel time, individual is not an employee of NIMI and Bidder organization will bear all responsibilities for benefits, and applicable payroll and taxes.
Per Diem Fees	N/A	Document anticipated per diem fees, if required, for lodging, meals, travel. Provide detail for any other anticipated out-of-pocket expenses related to these resources.

8. ADDITIONAL INFORMATION REQUIREMENTS

- 8.1.** Per Section 3.5 e), the Bidder must include the following additional documents as part of its Bid submission:
 - Detail list of similar HIE projects in which the Bidder has performed the type of services, of a scope and technical complexity similar to that anticipated for this project.

NIMI Request For Bid #2011-001 - VENDOR INFORMATION

BIDDING / PROPOSING COMPANY NAME _____

Address _____

City _____ State _____ Zip + 4 _____

Phone _____ Toll Free Phone _____

FAX _____

Name the person we may contact in the event there are questions about your bid / proposal.

Name _____ Title _____

Phone _____ Toll Free Phone _____

Address _____

City _____ State _____ Zip + 4 _____

FAX _____ E-Mail _____

All vendors that are awarded over \$25,000 on this contract will be required to submit affirmative action information to NIMI. Please name the person in your company that the state may contact regarding this plan.

Name _____ Title _____

Phone _____ Toll Free Phone _____

Address _____

City _____ State _____ Zip + 4 _____

FAX _____ E-Mail _____

4. Mailing address where NIMI purchase orders are to be mailed and person NIMI may contact concerning orders and billings.

Name _____ Title _____

Phone _____ Toll Free Phone _____

Address _____

City _____ State _____ Zip + 4 _____

FAX _____ E-Mail _____

NIMI Request For Bid #2011-002 - VENDOR REFERENCE

VENDOR NAME _____

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) used for three (3) or more installations with requirements similar to those included in this solicitation document, specifically planning and implementation of HIE services. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.

Company Name _____

Address _____

City _____, State _____ Zip +4 _____

Contact Person _____ Phone No. _____

E-mail address _____

Product(s) and/or Service(s) Used

Company Name _____

Address _____

City _____, State _____ Zip +4 _____

Contact Person _____ Phone No. _____

E-mail address _____

Product(s) and/or Service(s) Used

Company Name _____

Address _____

City _____, State _____ Zip +4 _____

Contact Person _____ Phone No. _____

E-mail address _____

Product(s) and/or Service(s) Used
