**RFP # 18-066  
Attachment F1  
 Technical Proposal Template for Wellness Campaigns and Challenges**

**Instructions:** Please provide a narrative response, addressing each of the following topics.Where appropriate, supporting documentation may be referenced by specific page and/or paragraph number(s). **Failure to provide responses that address all topics may result in the proposal being eliminated from consideration.**

|  |  |  |
| --- | --- | --- |
| Type of Service | Description | Does your organization provide this service? |
| Web Portal / Social Networking | Web portal consists of an online internet access point for resources related to health improvement and maintenance. Social networking capabilities allow users to interact with other users on health and wellness topics of interest supported by the portal. | *Yes/No.* |
| Incentive Administration | Incentive administration includes the ability to:   * Track activities, data or objectives that result in eligibility for rewards based on the employer requirements; Answer questions or provide information to participants about incentive requirements and eligibility; Report to the client, or client designee organization(s), which participants have reached the requirement for each level of incentive tracked; some organizations are also able to provide fulfillment services. Incentives may include prizes, gift cards, recognition, premium incentives, health account deposits or other rewards. | *Yes/No.* |
| Challenges and Gaming | Health and wellness challenges encourage participants to become involved in a relatively short term, goal oriented activity. Challenges can be individual, peer to peer, organization-wide or even enterprise - wide. Gamification of health programs is the application game playing concepts and practices to encourage ongoing engagement with the health management or wellness programs. | *Yes/No.* |

Account Management

1. Summarize the size of your service management team (e.g., implementation management, account management, strategic account management, etc.) that directly engages with clients on an operational basis and client assignment structure. Enter “Not Applicable” or “None” as needed.

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| --- | --- | --- | --- |
| Position/Title | Total number of FTEs (2017/current) | Average # of clients served per staff member | Average # of program eligible employee lives |
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1. Summarize the turnover and experience of your service management team. Enter “Not Available” or “Not Applicable” as needed.

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| --- | --- | --- | --- | --- | --- |
| Level/Title of Staff Member | 2017 Turnover | 2018 YTD Turnover | Minimum Experience Required | Average Years of Industry Experience | Average Years of Experience with Your Organization |
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1. Does your organization have its own proprietary communications department & staff to develop client communications? If "no", who within your organization develops client communications materials?

1. Describe the consultative role the account managers plays (i.e. assistance with development of strategy, communication strategy and materials, engagement methodologies).

1. How do you monitor account management performance and measure client satisfaction?

Compliance

1. Confirm that each of the service lines are compliant with HIPAA and GINA regulations for data privacy and security.

1. Has an employer/carrier partner terminated a contract with you due to your company's breach of the contract?

1. Is your company currently engaged in any legal actions/law suits? If yes, explain the nature and timing of legal actions/law suits.

1. How is your organization addressing EEOC regulations regarding employee notification and GINA spouse authorization compliance? Describe your ongoing monitoring and compliance of federal regulations.

1. Where and how is the employee notification shared?

1. Where and how is the spouse notification shared?

1. Will you provide the capability to make available, record and track the required spousal verification of receipt of the notification?

1. How does your organization ensure that individuals are given the opportunity to qualify for the full wellness incentive/reward at least once per year? What accommodations have you provided in the past?

1. Can the client modify the notification and authorization language?

Data Integration and Security

1. What is the physical location/locations of your data back-up?

1. Does your solution support industry recognized, encrypted data / file transfer capabilities (FTPS, SFTP, FTP with Encryption, etc.)?

1. Provide overview of your disaster recovery plan.

1. Do you accept responsibility for cure (giving notice and paying damages) of breaches? Have you experienced any data/privacy breaches? If so, what was the breach and how did you manage it?

1. Do you have SAS 70 certification?

1. How frequently can you accept eligibility files?

1. Can you support client-specific customizations to your eligibility file layout?

1. Please detail any policies and procedures you use to ensure the integrity, security and privacy of member data.
2. When was your last data security audit conducted?
3. Confirm that you will share data collected with the State’s data warehouse?
4. Describe how you use the data collected to outreach to members? Do you send targeted emails?
5. Describe how you make the portal available to a member with dual coverage through another participating employer?

Program Promotion

1. What services are provided as part of the standard communication package (e.g., paper, web-based, telephonic, posters, management debriefings, etc.)? What consultative services are provided as part of the standard communication package?

1. Are your standard communication materials available in other languages? If so, which languages?

1. Does your organization provide a communication’s “tool kit” that provides an employer’s staff the tools/resources to develop site-specific communication materials?
2. Describe your initial communication/marking plan for a group of this size.

1. How is your communication/marketing plan updated each year?

Web Portal/Social Networking

Web portal consists of an online, internet access point for resources related to health improvement and maintenance, tools, trackers, and other resources and programs. Social networking capabilities allow users to interact with other users by posting comments, questions, pictures, etc. on health and wellness topics of interest supported by the portal.

32. What features of your portal do you consider to be popular and/or differentiate your service from competitors?

33. When was the last significant upgrade made to you current web portal? When does your organization plan to release its next significant set of web portal upgrades? Provide description of the upgrade.

1. Is the portal customizable or configurable, please explain?
2. Do you provide a client the ability to add client's third-party vendor links to your portal?
3. Do you provide an employer the ability to add custom text and/or messaging to its portal site without assistance from your organization? How often are clients given the opportunity to revise the client-specific information on the web portal content?
4. Do you have the ability to provide a single sign-on to an employer's intranet or websites hosted by the client's other vendor-partners?
5. Can the portal be configured to provide different information based on client specific business units/locations?
6. On your standard portal home page, is an individual's incentive progress information prominently displayed on the home page or is there “one click” access for users to get to their incentive progress information?
7. Is the homepage tailored to individuals based on their HRA results, recommended programs, location, medical plan election, and/or other preference settings?
8. What is the source of the health content within your web portal?
9. Does your portal contain self-directed health educational modules / courses (e.g. 6-week course on tobacco cessation, nutrition, stress management etc.)?
10. List the health education modules / courses available. How often are these courses updated?
11. Can you track and report on completion of your programs / courses for employer incentive program purposes?

Mobile Access

1. Is your web site fully mobile-enabled? If not 100% mobile-enabled, what features on your primary web portal are not available on the mobile version?

1. Do you have an app available to complement your web portal? If yes, is the app available on all major platforms?

1. Describe any services that you have available through SMS / MMS text message capabilities.

Staff & Quality Assurance

1. What kind of technical assistance is available to support users?

|  |  |
| --- | --- |
| Assistance | Service Available (Y/N) |
| Phone 24/7 |  |
| Phone during business hours |  |
| Online chat |  |
| Email with 24 hour response |  |
| Email with 48 hour response |  |

1. What is your Quality Assurance process?
2. Describe your process and timeline for fixing errors and your regression testing.

Incentive Administration

Incentive administration includes the ability to:

* Track activities, data or objectives that result in eligibility for rewards (or penalty) based on the employer requirements. Incentives may include prizes, gift cards, or other rewards.
* Answer questions or provide information to participants about incentive requirements and eligibility.
* Report to the client, or client designee organization(s), which participants have reached the requirement for each level of incentive tracked.
* Provide fulfillment services if requested

1. Which activities are you able to track for purposes of supporting a client's incentive program?

1. Can you integrate and track client defined activities into your program (e.g., client would like to incent members to use Expert Medical Opinion services, etc.)?
2. Does your program differentiate between data that is self-reported or uploaded from a tracking tool or other validated source?

1. What incentives do you recommend based on best practices?
2. Can you support a points-based incentive design viewable by users on your portal? Mobile app?

1. From the member perspective on the web portal, can you support a historical view of incentive tracking?

1. Are there limitations for a client to customize the incentive design through your portal (be sure to describe what is not customizable, including points, levels, etc.)?

1. What activities are members able to track within the portal (e.g. steps, nutrition, water intake, exercise minutes, weight etc.)

1. How quickly will employees be able to see their points awarded for activities completed?
2. Can you support a custom incentive period to earn a reward, for example 1/1-8/31?
3. How do you handle grievances by members, for example if they believe they should have earned points for an activity?
4. How do you handle or process taxes to be collected on rewards?

1. Can you support a State plan design that offers raffle entries? Describe the process for fulfilling rewards won in a raffle. What other types of incentive fulfillment are available to your clients?

Data Management

1. Can you support multiple file feeds from different vendors or carriers regarding member participation, activities?

1. Do you have the ability to export data to the employer, payroll vendor or health plan for purposes of medical plan incentive or other internal distribution of incentives?

1. Please provide a copy of your standard file layout (incoming and outgoing).

Challenges & Gaming

Health and wellness challenges encourage participants to become involved in a relatively short term, goal oriented activity. Challenges can be individual, peer to peer, organization-wide or even enterprise – wide. Challenge activities are intended to create or reinforce healthy habits. Challenges may be self-reported or validated via various methods. Gamification of health programs is the application game playing concepts and practices to encourage ongoing engagement with the health management or wellness programs (e.g., use of points, rules, token economies, and other).

1. Please outline the different wellness challenges and group competitions your organization offers. Outline the medium in which they are delivered.
2. Discuss the gaming features and social networking tools that are available for challenges/campaigns.

1. Are the features and functions fully available on mobile-applications?

1. Describe how participants register for a challenge.

1. Can participants self-report activity of challenges into the portal?
2. What activity tracking devices do you connect with and how often is information shared with that partner?
3. Do you offer discounts or ways to earn any of these connected activity trackers?

1. Can you develop customized challenges for an employer? Outline what is customizable.

1. Can challenges be administered from multiple sources within the organization designated by HR (e.g. not the end users, but regional HR administrators or champions)?

1. Can users form their own teams within the challenge?

Metrics and Results

1. Provide your organization's standard performance standards for this service.

*Details limited to 500 words.*

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| --- | --- | --- | --- | --- |
|  | **Performance Standard** | **Target** | **BOB Average** | **BOB Best** |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |
| 6 |  |  |  |  |
| 7 |  |  |  |  |

1. Describe all STANDARD reports that are included in fees (both for the client and the participant). List them in logical order based on frequency provided (e.g. weekly, monthly, quarterly, annually).

|  |  |
| --- | --- |
|  | Response |
| Weekly |  |
| Monthly |  |
| Quarterly |  |
| Annually |  |

1. Please provide your recommended Evaluation and Reporting approach (i.e., methodology) for the following.  
   Please support your answer with blinded analyses that at a minimum demonstrate population health improvement (year over year, or 3+ years, preferred) and savings. Please ensure blinded analysis aligns with recommendations outlined below).

|  |  |
| --- | --- |
|  | Response |
| a. Health improvement |  |
| b. Clinical impact |  |
| c. Savings (outline approach for when medical data is available for analysis, as well as when it is not) |  |

1. What is your single best indicator of overall (net) health improvement (e.g., total health score, average number of health risks, % low vs. moderate vs. high risk)? What is your book of business net change in this metric?

1. Are real time, “self-service” reports available online to client via an administrator portal?

1. How frequently are reports on performance standard & guarantees provided to the client for your services?

1. What benchmark peer groups can you report for a client (e.g., geographic location, industry, size, other)?
2. How do you measure participant satisfaction?