

Request for Proposals: Web Redesign for OsteopathicAdvantage.com

Osteopathic Advantage		Issue Date:	8/17/09
The Water Tower Suite 380,		Closing Date:	9/4/09
5331 SW Macadam Avenue,		Time:	5:00 PM, PDT
Portland, Oregon 97239		Contact:	Dr Al Turner

Project Summary:

To give the Osteopathic Advantage website an updated design, a content management capability and some new functionalities.

<i>*Timetable for RFP</i>	
Issue Proposal	8/17/09
Deadline for Modification or Addenda	8/31/09
Vendor Proposal Due Date & Time	9/4/09
Review & Evaluation	9/4/09 – 9/11/09
Notice of Winner	9/14/09
Contract Negotiation	9/14/09 – 9/18/09
Projected Go Live Date	9/21/09

*The Timetable is to be used only as a guide and is subject to amendment.

A) Background



Osteopathic Advantage is a unique collaboration of physicians where patients with structural complaints, acute and chronic injuries related to sports activities, work related or motor vehicle accidents, and other conditions effected by the musculoskeletal system, are evaluated and treated, by Board Certified Osteopathic specialists offering a broad spectrum of “hands on” approaches in an out patient setting.

Osteopathic Advantage’s practice comprises 3 physicians, serving patients mainly from the Portland Metro area, but also from across the Pacific Northwest.

B) Proposal Information

1) **Purpose:**

The purpose of this proposal is to provide the Osteopathic Advantage website with an updated design, a content management capability and new functionalities.

2) **Contact Information:**

The point of contact for Osteopathic Advantage during the selection process is Dr Al Turner (Principal) for business questions, and Richard Appleyard (Consultant) for technical questions. All correspondence pertaining to this proposal should be directed or copied to Dr Turner:

Dr Al Turner – Business Questions

Principal
(503) 230-2501 office
(503) 731-0454 fax
E-mail: ommdoc@imagina.com

Mailing/Street Address:

Osteopathic Advantage
The Water Tower Suite 380,
5331 SW Macadam Avenue,
Portland, Oregon 97239

Richard Appleyard – Technical Questions

Medical Informatics Consultant
(503) 807-2986 office/voice mail
(503) 807-2986 cell
E-mail: richard@enablingit.com

3) **Cost:**

The total cost of a proposal submitted in response to this RFP *should not exceed \$5000*. Total price will be a consideration in selection of the winning contractor. However, it is most important that the justification and breakdown of the costs be made clear, and the required objectives are met.

4) **Submission:**

Interested vendors should submit one copy of their proposal electronically (as an MS Word or Adobe PDF file) by email to the Principal (and CC the Consultant) to arrive by the due date of this RFP. A return email will be sent to confirm receipt. If one is not received, then please contact the Principal to confirm. In addition, one print copy of each proposal, signed by an authorized representative of the firm, MAY BE mailed to the mailing address or faxed to (503) 731-0454.

C) Scope of Work

1) **General Information:**

Osteopathic Advantage is preparing to upgrade and redesign its website to provide more interaction with its customers and patients, and more ability for the clinics doctors and staff to directly maintain information on the website.

a) Existing Environment:

The existing website is a first generation website: static HTML, requiring a Web developer to perform updates. It is therefore difficult and cumbersome to update, and there is no interactive capability (submit messages, forms, etc.). There is no secure website capability.

The existing email communication is mixed and inconsistent, clinicians use different email addresses and domain names, and unencrypted communication by open Internet email. The clinic's email system is under utilized.

The existing EMR is Filemaker Pro-based. The existing billing system is PowerMed Practice Suite (Filemaker Pro 5.5v2) that integrates scheduling, billing and EMR. PowerMed also allows for messaging in house and documented within the EMR.

b) Upgraded Environment:

The next version of the website will be a second generation website: dynamic HTML, with a content management system that allows a user to log in and make updates to the pages without Web development training.

The clinic's email needs to be integrate with the secure messaging on the website.

The EMR and Billing will not be integrated with the website for this upgrade, but is planned for the future.

2) Upgrade Objectives (Required):

The website upgrade must provide the following new functionality,

a) Content Management System (CMS)

The top objective of the website upgrade is to make the new website easier for clinic's staff to modify and update. The CMS will provide the following features that clinic staff will be able to perform with little or no training,

- Ability to edit content on pages as well as add/delete pages
- Ability to edit the site structure (information architecture), change menus and sections to the website and add new functionality
- Ability to maintain blogs and podcasts (web, audio, video)
- Ability to add print material, i.e., PDFs, for download

The website will be open (free access to all information) initially, however certain information and media may become restricted and/or fee-based in the future, so it is important that the infrastructure be able to accommodate this at a later date.

b) Secure Messaging/Email

Another priority is to provide secure email communication between the clinic and its customers.

- Ability to transmit protected health information securely and according to HIPAA regulations.
- PHI must not be transmitted over open (unencrypted) email format.
- Incoming messages should be submitted using an online form in the Contact Us section of the website, or by reply to a securely delivered message.
- Outgoing messages should stay on a secure email/message server, and a notification email sent to the recipient indicating there is a message available for pick-up.
- The secure messaging should be integrated with clinic's email system

c) Website Redesign

Another priority is to update the website structure, layout and visuals as the site is migrated to the CMS.

- The main goal should be to update Information Architecture (IA) and Navigation of the website in order to accommodate new and future functionality, as well as be more responsive to patients and potential customers.
- An ancillary goal should be to update as necessary the Visual Design and the graphic imagery of the website. However this should be limited to that required as part of the migration, and that amends the current design. A full visual redesign and color treatment is not required at this time, and should only be proposed if there is little or no additional cost involved, or impact on the pricing.

3) Future Objectives (Optional):

The following objectives are not a requirement of this upgrade of the website but are planned for some point in the future. They are listed here as they may impact design decisions for the current website upgrade even though they are not being implemented at this point in time.

d) Content Management System

The ease of adding functionality to the CMS is an important factor in the consideration of the proposed solution. Additional functionality anticipated in the future includes,

- Customer sign-on - ability to have a restricted area of the site that customers/clients log into to access additional information, e.g., premium content that is not freely available on the Internet. This could also be integrated with the Personal Medical Record area of the EMR.
- Patient Education tools
- Online Communities around medical conditions and treatments

e) Secure Forms Submission

Additional functionality anticipated in the future includes the ability for customers/clients to send information, traditionally collected on paper forms, to the clinic in a secure manner,

- Ability for clinic staff to add, edit, delete forms used to collect information in health care process
- Ability for forms to be accessed on secure server, and submitted by patients at their convenience (24x7)
- Forms and data are stored in a database and are retrievable by clinic staff in various formats (HTML, PDF, .csv, .xls)
- Ability to interface the form data collected with the clinic EMR and administrative systems.

f) eCommerce Engine

Additional functionality anticipated in the future includes the ability for customers/clients to pay online, e.g., their bill, premium content, in a secure manner,

- Ability to make pages, content (articles, podcasts, videos) available for a fee.
- Ability to make part of the website accessible to subscribers

This could be at periodic subscription rates, or to those who have received service, or those registered as their primary care physician. Additional services could also be provided, such as email consultations

g) Electronic Medical Record (EMR) Integration

- Ability to access a Personal Medical Record area of the EMR, i.e. ability for customers to see their medical record information in a format that is easy for them to use and understand.

h) Financial / Billing Integration

- Ability to integrate with the PowerMed Practice Suite, or future administrative and billing systems

4) Additional Objectives

The following objectives are additional business requirements for the website.

a) Hosting Costs

Vendors should provide details of all costs associated with hosting the new website. Pricing should be provided on a monthly and annual payment schedule, as well as other schedules that are available. If the vendor does not provide hosting, then pricing for (a) recommended third party hosting service(s) should be provided. These hosting providers should support the proposed Web development platform.

b) Migration Costs

- Vendors should provide details of all additional costs associated with migration from the existing system to the new system. This can be in terms of an hourly rate and based on the content to be moved, e.g., the number of HTML pages.
- Vendors should also provide details of the costs to migrate off their servers or to an alternate hosting service, e.g., in the event of contract termination, the vendor going out of business, etc.

c) Maintenance Requirements/Costs

The following requirements should be provided for as part of the implementation and then covered under an ongoing maintenance agreement.

- **CMS Documentation / Knowledge Transfer.** All systems must be fully documented as to the specifications and configuration, and operation. This documentation must be kept up-to-date at regular intervals and can be part of a maintenance agreement. Copies and any subsequent updates should be provided to Osteopathic Advantage in a timely fashion. Initial user training should be provided within the implementation, as well as support under a maintenance agreement.
- **CMS Upgrades.** The CMS should be kept up-to-date to maintain website security and continuity of operation. Upgrade process should include a backup and QA/test plan to ensure continued smooth operation.
- **Backup / Mirroring of Servers.** All systems must allow for frequent and regular backups. Wherever possible, the server systems should be mirrored at alternate locations (Osteopathic Advantage or 3rd party) to provide for disaster recovery and quick migration of service.
- **Maintenance of Web Server.** The Web server hosting platform (and OS) should be kept up-to-date to maintain website and server security (see PCI-DSS) and continuity of operation.
- **Source Code Protection.** The vendor shall provide to Osteopathic Advantage one (1) complete copy of the source code used in the preparation of the software, brought up to date as of the date of delivery of such source code. At a minimum the source code should be held

in Escrow by a third party agreed to by Osteopathic Advantage which will have access to such source code upon the occurrence of any of the following events,

- If any or all material part of the source code is generally made available by Vendor, with or without additional cost, to other users of comparable software of the Vendor; or
- If the Vendor's ceases, for any reason, to do business; or
- If the Vendor discontinues maintenance of software; or
- If the Vendor commissions any act of bankruptcy and, if such proceedings shall not be dismissed against Vendor within sixty (60) days.

d) Search Engine Optimization/Web Accessibility

CMS must be optimized for search engine access, and allow for easy maintenance of search engine accessibility features, such as keywords, required HTML tags. In addition, the CMS should meet W3C Accessibility standards (www.w3c.org) to the greatest extent possible, and separate the content and page structure from the presentation layer (use XHTML/CSS in a well designed manner). Where AV material is presented, the ability to add text descriptors and transcripts should be provided to the page author. Flash should be provided in a way that does not restrict access to the website content to

e) Mandatory Requirements

i) HIPAA (Health Information Portability and Accountability Act):

The Health Insurance Portability and Accountability Act ("HIPAA") of established rules and regulations regarding privacy and security of healthcare data, transaction formats, and other matters. It is a requirement of our company that vendors products and services are fully compliant with these regulations. The parties agree to negotiate such requirements in good faith and in a timely manner, including costs, if any, associated with such requirements. Once the website holds any patient identifiable information, the website and platform will need to be compliant with this standard. More information can be obtained by visiting the following websites, <http://www.hipaa.org/> , www.hhs.gov/ocr/hipaa/ .

ii) PCI-DSS (Payment Card Industry Data Security Standard):

PCI-DSS is a worldwide information security standard assembled by the Payment Card Industry Security Standards Council (PCI SSC). The standard was created to help organizations that process card payments prevent credit card fraud through increased controls around data and its exposure to compromise. The standard applies to all organizations which hold, process, or pass cardholder information from any card branded with the logo of one of the card brands. Any eCommerce solution and platform will need to be compliant with this standard. As functionality will be added to the website at a future date, it is imperative that the website and the hosting solution meet this standard ASAP. More information available at https://www.pcisecuritystandards.org/security_standards/pci_dss.shtml

iii) Registered with Oregon:

The selected vendor may be required to be registered to do business in Oregon under Oregon Law. If you are not already registered to do business in Oregon please contact Secretary of State Corporation Division and determine if your provision of services and/or supplies requires registration. If you are registered to do business please include a copy of your registration or a letter indicating your registration and number. If you are not registered but need to be registered please indicate the same in your proposal

and your willingness to register if the contract is awarded to you. Information concerning the Secretary of State Corporation Division can be obtained by calling (503) 986-2200 or visiting the web page at <http://www.sos.state.or.us/corporation/corphp.htm>

f) Proposal content:

Respond in the following sequence and in an indexed document and/or a bookmarked PDF file.

i) Background.

Background information on your company, including number of years in business, scope of business (i.e. local, statewide, national), and number of permanent, full-time employees in the local office.

ii) Qualifications.

List the qualifications of individuals with your company who will work on these projects, including education and experience. Demonstrate how education and experience relate to accomplishing the scope of work. Designate the individual who will have primary responsibility for the project. Describe any ongoing program of employee training that you may have.

iii) Customer Service Philosophy.

Describe your company's philosophy of customer service.

iv) Proposed Project Plan.

Summarize how your company will accomplish this project. List all of the steps, and estimated timelines for accomplishing all steps. Alternatively, provide the steps and timelines for a project of similar scope and focus.

v) Osteopathic Advantage Responsibilities.

Specify what information, plans, and/or computing equipment that Osteopathic Advantage will need to provide, or be responsible for, in order to complete this project.

vi) Warranty.

Describe warranties related to the Scope of Work (equipment, hardware, and software). Detail warranty durations on maintenance versus professional service. Who is to be contacted for problems with hardware or software (names, phone numbers, and response times)? How is the maintenance priced? If maintenance is tiered, then describe the tier structure.

vii) Maintenance.

Describe the cost and duration of a maintenance contract (post warranty) that would cover the various hardware and software components of this system (specify equipment, hardware, software, or system)? Include response times, resources available, and response locations. Is there a charge for software upgrades, or are they included in the cost of the maintenance contract?

viii) References.

List three local references for which you have provided a solution similar to that which you are proposing for Osteopathic Advantage.

ix) CMS Description & Operation.

Describe the proposed system. Attach any diagrams that may be helpful. Describe how the CMS would operate during a typical day. In particular, list those items that relate to publishing content, efficiency gains, reporting and Web logging capabilities, and ease of use/training required. Also, describe any day-end, month-end, or archiving and database backup activities.

x) CMS Technical Specifications

Describe the technical requirements of the system (Operating System, Web application platform, and other software installation requirements. Describe any license requirements and associated costs.

xi) Training.

Describe any training that is necessary for proper operation and on-going maintenance of the CMS. Identify resources that will provide training, the training plan and what will be covered, and the cost of proposed training.

xii) Emergency Operation / Business Continuity.

Describe how your company would respond to:

- i. Code failure of the CMS preventing the entire website from running (website offline)
- ii. Limited code failure of the CMS causing parts of the website to stop running (partial website offline)

If providing website server hosting, please also describe how your company would respond to:

- iii. Complete server failure requiring equipment replacement (loss of hardware)
- iv. Hard drive / File system failure (loss of data)
- v. Data Center Failure (loss of power, Internet connection)

xiii) Expansion and Upgrades.

Describe additional options and capabilities provided by your company's solution.

Describe the provision for upgrades to the CMS. What kind of testing and checking will be performed to ensure that the upgrade will not cause the CMS and website to fail.

xiv) Value-Added.

Describe any other skills or value-added services that you may offer which are not reflected elsewhere.

xv) Estimated Cost.

For each of the items described in Pricing table, list the cost to Osteopathic Advantage for hardware, software, and personnel costs. Provide fixed cost estimates for the main deliverables, and periodic costs for the ongoing services and fees. Additionally, personnel costs should be broken into project labor versus professional services (analysis, evaluation, sizing). Include projected system maintenance costs, and five-year life cycle cost.

D) Pricing Table

Pricing Table	
Itemize pricing for at least the following elements. List the item as included or not applicable, do not leave blank	
Description:	Rates/Pricing:
1. Setup, configuration and design of CMS	
Cost to setup CMS and configure to meet the needs of the Osteopathic Advantage website.	(Fixed cost)
1. Migration of Osteopathic Advantage website to CMS	
Using the current architecture and design, adding additional functions of updateable pages and content sections, blogs, and PDF download capability and.	(Fixed cost)
2. Implement Secure Messaging	
Leaving messages via secure website, returning messages via secure website and email notification	(Fixed cost)
3. Implement Secure Forms	
Ability to create, edit, delete online forms, ability to access the forms submitted.	(Fixed cost)
4. Web Server Hosting Service fees, including backup and business continuity	
Vendor provided (__MB web space, __GB web transfer)	(Monthly, Annually)
3 rd party provided (__MB web space, __GB web transfer)	(Monthly, Annually)
5. Secure Web Server Fees	
SSL certificate	(Annually)
6. Email Server Hosting Service fees	
Vendor provided (# mailboxes, POP/IMAP/MS Exchange, __GB mailbox)	(Monthly, Annually)
3 rd party provided (# mailboxes, POP/IMAP/MS Exchange, __GB mailbox)	(Monthly, Annually)
7. Mailing List Hosting Services (integrated with CMS)	
Ability to send bulk messages to customers/clients, signups on website	(Monthly, Annually)
8. Professional Services rate (by type of service if differentiated)	(Hourly, Daily)
9. Miscellaneous Services	