Making it All Work: Managing a Procurement for a CIE Technology

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Session Reminders

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August 12, 2020

Making it All Work: Managing a Procurement for CIE Technology

Agenda

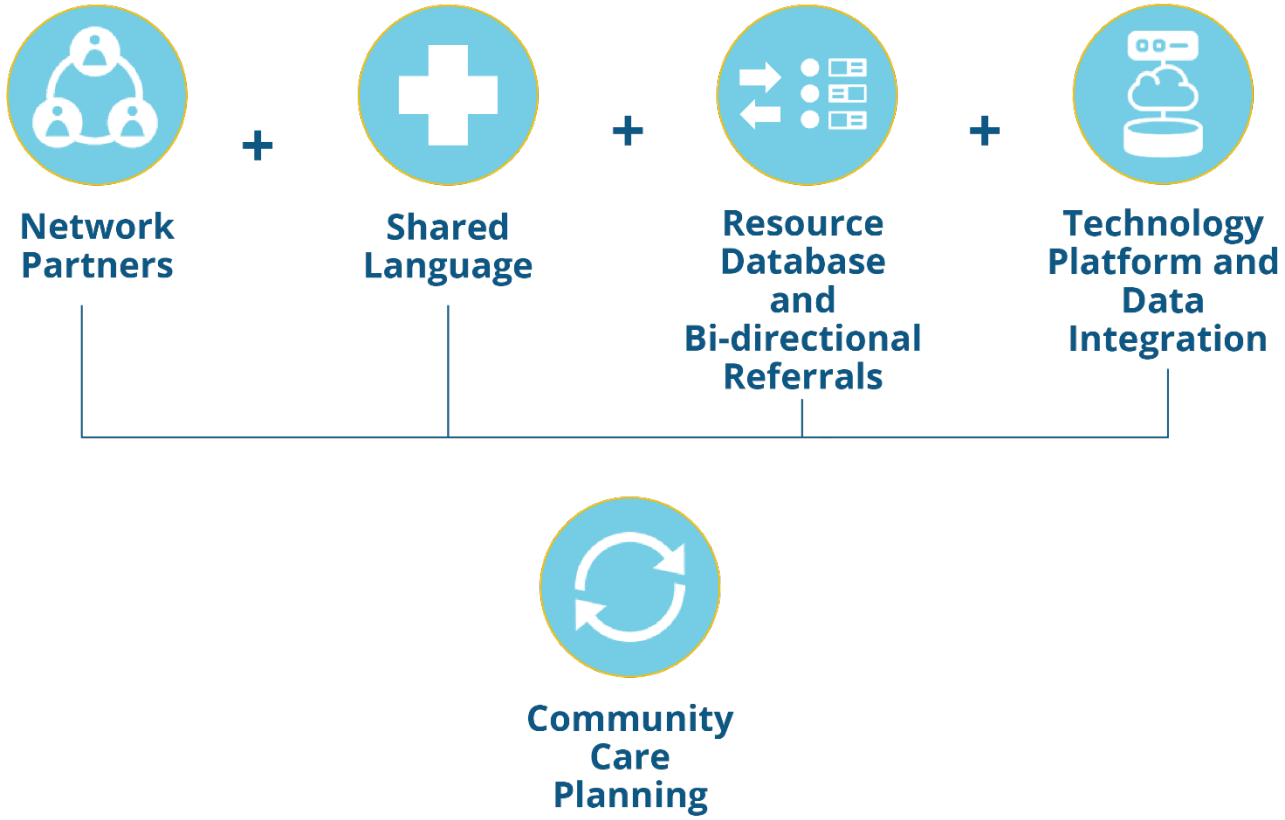
What is a CIE?

Gateways to Procurement:

1. Define what You Need
2. Define who Needs It
3. Narrow Down Your Choices
4. Structure Your Procurement
5. Position Technology for Implementation

Discussion

What is a Community Information Exchange (CIE)?



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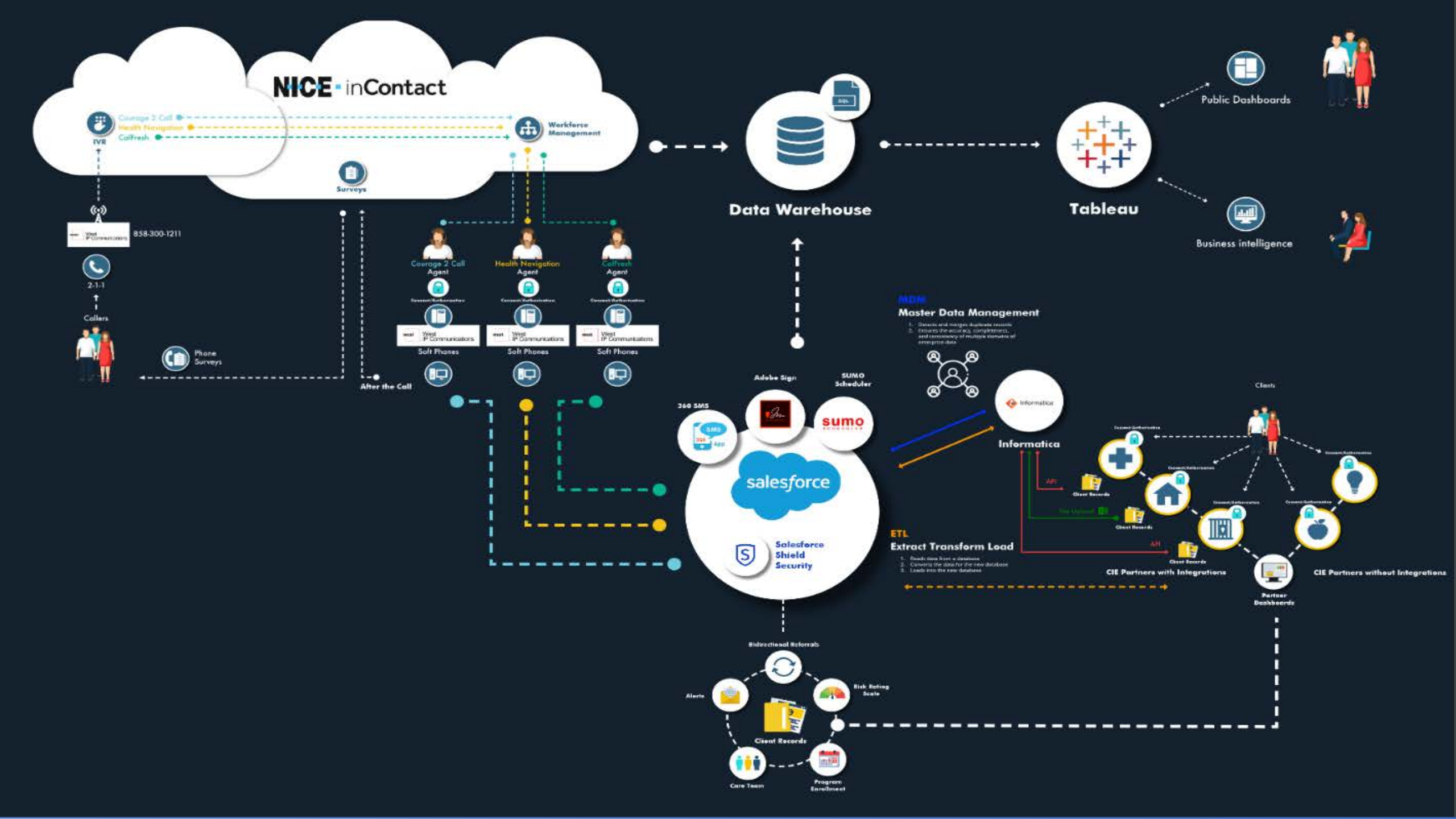
CIE Technology Platform


NICE · inContact
Courage 2 Call
Health Navigation
CalFresh
IVR
Workforce Management
Surveys
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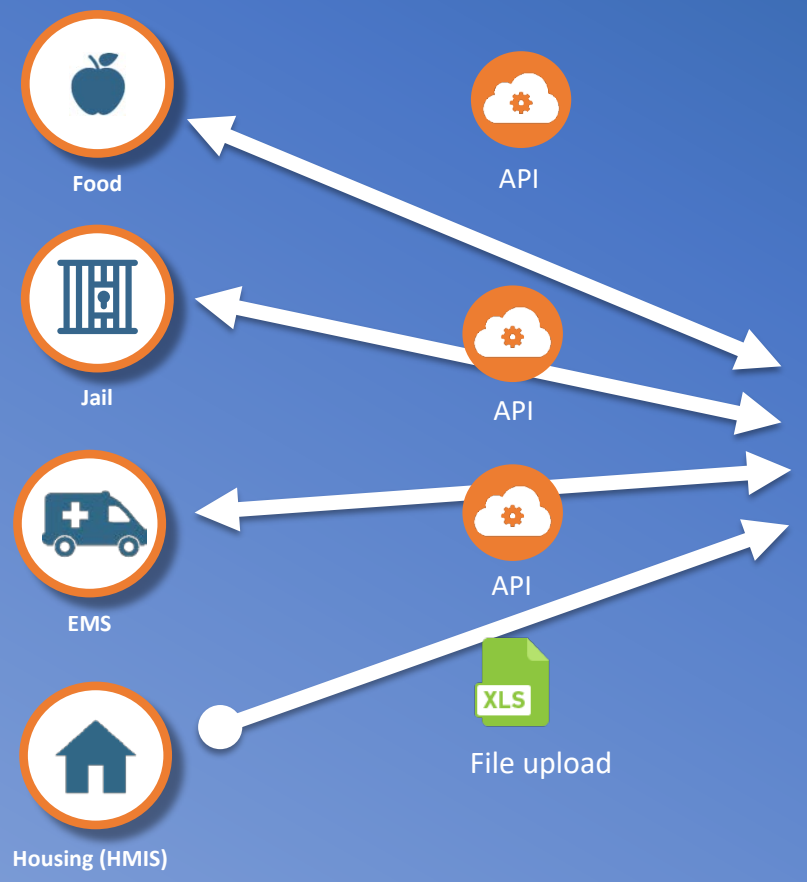
Callers
Phone Surveys
After the Call
Courage 2 Call Agent
Health Navigation Agent
CalFresh Agent
Soft Phones
Soft Phones
Soft Phones
Data Warehouse
Tableau
Public Dashboards
Business intelligence
MDM
Master Data Management
Informatica
Adobe Sign
SUMO Scheduler
360 SMS
salesforce
Salesforce Shield Security
ETL
Extract Transform Load
Clients
Client Records
Client Records
Client Records
CIE Partners with Integrations
CIE Partners without Integrations
Partner Dashboards
Bidirectional Referrals
Alerts
Risk Rating Scale
Client Records
Care Team
Program Enrollment

Selecting a Technology Platform



MDM

Master Data Management

- Detects and merges duplicate records
- Ensures the accuracy, completeness, and consistency of multiple domains of enterprise data

informatica

CIE
shared client record
salesforce

ETL

Extract Transform Load

1. Reads data from a database
2. Converts the data for the new database
3. Loads into the new database

Alerts

Single Sign on

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Gateways to Procurement

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Define what you need

Conduct a Community Needs Assessment

CIE efforts involve multiple sectors, each with their own “starting position”

- Do not assume that your organization, no matter how well positioned in the community, really has a firm grasp of what all these needs are
- Even though some sectors that participate in CIE do not have strong data standards, that does not mean that they do not have a keen awareness of what their technology needs are

Map out what you **have** and what you **need**

- Create a community data and systems asset map
- Define who your users are, and what they need/want to do, and what data they need to access to do it

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Define what you need

Involve the Community in the Needs Assessment

Engaging the community early in the process is **key** in establishing stakeholder buy-in

- …and **not** just as key-informants or interviewees!
- Technology procurement is a part of the stakeholder buy-in and community governance process – it should not happen in a side-committee just because it is "technical"
- **Do not** repeat the mistake of health-system led efforts to "integrate" other sectors by leaving key participants out of the process
- Consider creating a formal procurement committee that is responsible for technology selection, with broad community representation and that includes individuals with non-technical backgrounds

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Define Who Needs It

Define the Users

Who is actually going to use this system?

Determine their capacity to use it

Be realistic about where the users are today, and what it will take for them to really use the system you are designing

- Do they need special, integrated workflows to realistically use the system?
- Are different, sector or user-specific user interfaces something you need?
- What is the realistic pathway for users to begin to integrate the system into workflows?

Include Users in the Process

The intended users of the system should be represented in the needs assessment and the technology selection process

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Narrow Down Your Choices

There is no "Silver Bullet"

- There is no such thing as a "CIE Vendor"
- You will almost certainly need to use more than one technology product or work with a vendor to develop new functionality

Prioritize your Needs

- Use your needs assessment and stakeholders to determine what needs are most critical for early success of your CIE project

Create Business and Technical Requirements

- Often a key use-case for the ED or in ambulatory settings where there are not well-defined medical homes/highly mobile populations are present

Survey The Market

- Which vendors seem to match most or all of your unique set of business and technical requirements?
- **Put them on a short-list**

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Narrow Down Your Choices

Types of Vendors

- Shared Care Plans / Community Collaboration Tools
- One-Way or Closed-Loop Referral Vendors
- Data Integration, interfacing, and “HIE” vendors
- Data Aggregation, Normalization and Warehousing
- Data Analysis and Visualization

AND MANY MORE!

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Structure Your Procurement

Everyone Loves Structure!

Your Stakeholders will LOVE IT! A structured RFP can be a way for you to explain to vendors (and stakeholders) exactly what ***it is*** that you want to do in your community. ***If you can't explain it in an RFP, you haven't gathered enough information through your needs assessment.***

Vendors LOVE IT! You will get more quality information from vendors through an RFP – they will take you more seriously.

***YOU* Will LOVE IT!** Being able to compare apples to apples helps cement stakeholder buy-in, it builds trust in your process, and it helps ensure you will get a product that really meets your needs.

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Key Components for a Procurement

1. Explain your project to the vendors – and not just the technical parts…and then make them explain their approach back to you!
2. Use a quantitative scoring methodology to see how well vendors stack up against your technical requirements
3. Force vendors to compare pricing in an apples-to-apples format
4. Do demos, but do not let them outweigh #1 - #3

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Positioning Technology for Successful Implementation

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Create Community Ownership

- **Engage end users** from community partner organizations in the design, development, testing, launch and upgrade process.
- **Build shared buy-in and ownership** of the system and ensure that the platform will meet the current and future needs of end users.

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Questions / Discussion

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THANK YOU!

What's Next:

10:15 AM - 10:45 AM

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