



## **STEP 3.1: Organize your implementation team**

### **➔ What is the purpose of this step?**

The purpose of this step is to develop a specific working team, work plan, and timeline for your PHDS project, and to assemble the data needed to conduct your PHDS sampling and administration.

#### **In this step you will:**

- Build an internal and external team to implement the PHDS project.
- Assign specific roles to each team member.
- If Applicable: Hire a survey vendor.



### **Guidelines and Issues to Consider**

- Determine which tasks will be completed internally and which will require external partners or vendors.

When building your internal and external PHDS teams to administer the survey, consider the following:

- Which parts of the process can you handle internally? Which parts will require hiring an external vendor?
- Do internal staff members have the skills/expertise as well as the time needed to complete the tasks that will be assigned to them?
- Do you have the resources to pay external vendors, if you need them? How will you do so?
- What is the status of the data systems you will use for sampling and gathering information? Will you need to contract with an external organization to gather population files?

- ☑ Immediately involve all leaders whose approval is needed to implement your PHDS project activities or to disseminate PHDS findings.

Obtaining the full support of senior leadership is essential to the success of your PHDS project. While it is possible to conduct the PHDS without the early involvement and support of senior leadership, they may key to community-wide distribution of the results. They also may help explain the value of the project to others, such as the chief of pediatrics, or approve contracts with external vendors.

- ☑ If you hire an external vendor, be sure to carefully craft a survey vendor request for proposal (RFP).

Now that you have determined which parts of the project will be contracted out, you will likely need to find a suitable survey vendor. Your organization may have specific rules and requirements for hiring a vendor. Depending on these requirements, hiring a vendor can be a lengthy process.

The process begins by writing an RFP (which may go by a different name in your health system). This is the document that informs potential bidders of exactly what work needs to be done, how it should be done, and when it needs to be finished. This document should be as detailed and specific as possible. Be sure to review the technical specifications before you write the RFP so that all necessary details are included. Also include management tasks such as regular progress meetings and/or interim reports, decision-making processes, and conflict resolution procedures. Make sure bidders understand exactly which costs they are responsible for, such as survey printing and mailing costs or report development and testing costs.

All deliverables that you expect from the vendor should be specified in the RFP. This includes interim deliverables, such as progress reports and interim completed PHDS survey data sets, as well as final deliverables, such as the data set and all documentation about the project. If you make changes later on, it will most likely cost you more than if they were included in the original RFP.

The RFP should provide potential bidders with information on the processes for bidding, evaluating, and selecting a vendor. It is important to include the following information in your RFP:

- The deadlines and format for proposals.
- Information about how bidders can ask questions or get clarification when preparing the proposals.
- The criteria used to score the proposals and select the vendor.
- Provisions for data security and confidentiality. Person-identifiable data is necessary only for the administration of the survey. Include provisions for the return or destruction of any data files with identifying information that were needed for the sampling and administration of the survey.

- ☑ If you hire an external vendor, carefully evaluate candidate survey vendors who respond to your RFP.

When evaluating survey vendors who respond to your RFP, the minimum scoring criteria should evaluate applicants on how well they demonstrate they have the following:

### **General characteristics**

- An understanding of the overall project and the goal of the PHDS.
- A comprehensive response to all tasks described in the RFP.
- Sufficient and qualified staff to do the work.
- Sufficient facilities and resources.

### **PHDS-specific characteristics**

- Experience and expertise in sampling, specifically:
  - Experience in obtaining population files from health systems and pulling samples for survey administration based on enrollment and health care utilization. Vendors with experience in calculating child-focused HEDIS measures should be preferred.
  - Experience in creating weighted, stratified sampling files based on information about the child's enrollment in a health system and child's age.
  - Experience pulling survey samples at the level or unit of analysis desired, such as health care provider or office.
- Experience in conducting parent-based surveys about the quality of care received, specifically:
  - Demonstrated ability to maximize response rates and produce acceptable telephone response rates. The telephone response rate is calculated by dividing the total number of completed phone interviews by all possible phone respondents. An acceptable response rate is 40 percent or higher.

The contract will be based on the project detailed in the RFP. Remember that the contracting process will be easier if your RFP contains specific details on the scope of the work, deliverables, and timelines. Consult your legal department to make sure all necessary legal language and requirements are included. This is most likely standardized for all contracts with external vendors.

In addition, ensure that the data collection and sharing are compliant with the Health Insurance Portability and Accountability Act (HIPAA), so that any public health information shared between organizations is strictly protected. Include provisions for the return or destruction of personal health information once the project is completed. Create a HIPAA Business Associate agreement between all parties who will have access to the data.

