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| ETF_logo_large | STATE OF WISCONSIN **Department of Employee Trust Funds**  **Robert J. Conlin**  SECRETARY | 801 W Badger Road  PO Box 7931  Madison WI 53707-7931  1-877-533-5020 (toll free)  Fax 608-267-4549  etf.wi.gov |

**Request for information (RFI)**

Date: June 10, 2016

To: All Vendors

Subject: **Request for Information (RFI) ETF0056 Data Warehouse and Visual Business Intelligence Solution**

**RFI Response Due Date: June 17, 2016 by 2:00 PM CDT**

The Wisconsin Department of Employee Trust Funds (ETF) on behalf of the Wisconsin Group Insurance Board (Board) is seeking input from interested parties on draft requirements for an upcoming Request for Proposals (RFP) ETG0004/ETG0006 for data warehouse and visual business intelligence services. The purpose of publishing the draft requirements is to solicit comment and input from potential bidders in the form of an official response.

Attachments included with this RFI document include:

* Requirements Document
* Questionnaire
* Vendor Response Form
* ETF0056 Designation of Confidential and Proprietary Information
* ETF0056 Non-Disclosure Agreement (NDA)

Thank you in advance for your response.

Beth Bucaida

Purchasing Agent-Senior

Department of Employee Trust Funds

[ETFSMBProcurement@etf.wi.gov](mailto:ETFSMBProcurement@etf.wi.gov)

**Request for Information (RFI)**

**ETF0056 Data Warehouse and Visual Business Intelligence Solution**

# Project Name

Data Warehouse and Visual Business Intelligence Solution for the Department of Employee Trust Funds (DW-VBI Solution)

# Purpose

The Wisconsin Department of Employee Trust Funds (ETF) is seeking input from interested parties on an upcoming Request for Proposals (RFP) for a data warehouse and visual business intelligence solution (DW-VBI Solution). **When the RFP is released, vendors will have the opportunity to bid on the data warehouse or the visual business intelligence solution, or both.** The purpose of publishing this RFI is to solicit comments and input from potential proposers and provide interested parties with information to enable them to prepare and submit a proposal in response to the RFP.

# Response Expectations

1. To quicken and simplify ETF’s review of vendor responses and to ensure that each response receives the same orderly review, please enter your responses into the Vendor Response Form located on the last page of this RFI document.
2. ETF requests that your response not exceed ten (10) typed 8 ½” x 11” pages, using 9 pt. Arial font.
3. Responses to this RFI must be returned via email no later than the due date and time specified on the first page of this RFI document.
4. Include with your email:

* an unprotected Word document with your responses entered into the Vendor Response Form;
* a completed, signed and scanned copy of ETF0056 Designation of Confidential and Proprietary Information; and
* a completed, signed and scanned copy of ETF0056 Non-Disclosure Agreement (NDA).

1. Email the Vendor Response Form and the two documents listed above to:

[ETFSMBProcurement@etf.wi.gov](mailto:ETFSMBProcurement@etf.wi.gov). The e-mail subject line must read:

**RFI ETF0056 – Response: [Vendor’s Name]**

# Confidential Information

This RFI and the vendor’s RFI response shall be kept by ETF and made a part of the public record. ETF REQUESTS THAT VENDORS NOT SUBMIT INFORMATION IN THEIR RESPONSE THAT THE VENDOR CONSIDERS PROPRIETARY OR CONFIDENTIAL. However, if a vendor chooses to submit information that includes proprietary and confidential information, which qualifies as a trade secret, as provided in § 19.36(5), § 134.90(1)(c) Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law, then the vendor must clearly designate the portion of its response that it considers exempt on the attached form, ETF0056 Designation of Confidential and Proprietary Information. ETF will not accept or consider responses from vendors that attempt to exempt the response in whole from disclosure.

# No Obligation

1. Responses are voluntary and shall not bind either the respondent or ETF in any way. This RFI is issued solely for information and planning purposes, and does not constitute a solicitation. Responses to the RFI will not be returned. Responses to this RFI are not an offer and cannot be accepted by ETF to form a binding contract. ETF is not liable for any cost incurred by the vendor in responding to this RFI.
2. ETF will not respond with answers to any questions submitted as part of the response.
3. Responses to this RFI will be reviewed and may be used to further develop, change, alter or delete specifications, terms or conditions within the RFP. Providing a response to this RFI is not a prerequisite to submitting a proposal should ETF offer such an opportunity in the future. The contents of responses to this RFI will not be considered in the review or evaluation of future bids or proposals.
4. ETF reserves the right to ask for clarification of the vendor’s response.

# Benefit Consultant

# In November of 2015, the Wisconsin Group Insurance Board’s (Board) benefit consultant, Segal Consulting (Segal), presented a report containing analysis of the current Group Health Insurance Program (GHIP) for state employees and the Wisconsin Public Employer (WPE) program for local government employees, and recommended strategies for program design that would contain future cost increases and improve health outcomes while increasing the efficient delivery of quality health care to program members. A significant component of the report is a recommendation for a Total Health Management model that includes driving engagement in wellness and disease management programming. As a result of this recommendation, the Board has approved 2016 solicitations for a third party administrator of wellness and disease management programs, the development of data warehouse and visual business intelligence solutions, and proposals to evaluate self-insurance and regionalization of the health insurance program. Segal’s report and a link to the implementation memo can be found at: <http://etf.wi.gov/boards/agenda-items-2015/gib1117/item3ar.pdf>. Segal is ETF’s actuary, as such, ETF plans to share vendor RFI responses with Segal. To that end, vendors are asked to complete and return the attached ETF0056 Non-Disclosure Agreement (NDA).

# High-Level Description of the Project

The DW-VBI Solution includes data aggregation, analysis, and reporting services for the GHIP and WPE programs.

# 7.1 Current State & Background

ETF is a Wisconsin State agency that administers retirement, health, life, disability, and long-term care insurance programs for over 570,000 state and local government employees and annuitants.

The GHIP/WPE programs, administered by ETF and 18 contracted health plans (17 fully-insured and 1 self-insured), is primarily a fully insured health plan for the employees of more than 50 state agencies, the Legislature, the University of Wisconsin System, the University of Wisconsin Hospital and Clinics, over 350 local government employers, retirees, and dependents. It is one of the largest groups in Wisconsin spending $1.4 billion in health insurance premiums annually.

Currently, most health insurance benefits (98%) are administered through 17 competing, fully insured health plans that offer a prescribed “uniform benefit” package, the “It’s Your Choice (IYC) Health Plan,” as well as a high deductible health plan (HDHP) option. The health plans follow the Board’s guidelines for eligibility and program requirements and participate in an annual competitive premium rate bid process. Most health plans are health maintenance organizations (HMOs) and one is a preferred provider organization (PPO).

The State also administers a small self-funded offering through both the “IYC Access Health Plan” and “State Maintenance Plan” that are administered through a single administrator. The IYC Access Health Plan provides freedom of choice for providers and also has an HDHP option. The State Maintenance Plan offers the IYC Health Plan benefit design, including a HDHP option, and is available in regions of Wisconsin where there is not reasonable access to providers through a fully insured health plan.

The pharmacy benefit is self-funded and has been administered through a Pharmacy Benefit Manager (PBM) since 2004. This includes providing Medicare Part D benefits through an Employer Group Waiver Plan (EGWP) since 2012.

The dental benefit program is also self-funded as of 2016. Enrollees of the GHIP/WPE programs may opt out of dental coverage during the annual open enrollment.

ETF does not currently have the ability to evaluate and analyze costs, utilization, health risk, provider quality, and health plan performance from a single data source for the GHIP/WPE programs. The data that is available is housed in multiple locations, covering different historical periods and in varying formats and quality.

# 7.2 Future State: Project Scope and Objectives

In an effort to contain future cost increases and to improve the health of participants of the GHIP/WPE programs, ETF and the Board are seeking an innovative vendor (or vendors) to be a strategic partner in implementing data warehouse and visual business intelligence solutions as presented by Segal to the Board in November of 2015. Implementation of data warehouse and visual business intelligence solutions will lead to improved health outcomes and impact future costs by supporting a variety of uses that include, but is not limited to, measuring and analyzing:

* **Medical and Pharmacy Quality Adherence** – To measure and evaluate preventative service compliance, compliance with standards of care, and prescription drug adherence.
* **Health Management and Wellness Program Design** – To perform analyses that support wellness design, including health risk assessment data analysis, chronic conditions profiling, and program design modeling.
* **Benefit Design and Network Management** – To identify and evaluate services that support design effectiveness, network performance, cost sharing strategies, and vendor management.
* **Provider and Facility Quality** – To evaluate and compare quality and efficiency at the provider, provider group, or facility level.
* **Plan Performance and Contract Adherence** – To evaluate and monitor targeted performance guarantees, conduct discount analysis and review payment accuracy.
* **Financial Management** – To measure and analyze the aspects of a health plan that are related to budgets, forecasts, rate setting, and reporting.

The contracted vendor(s) must:

1. Be a partner to ETF and the Board in analyzing data and trends to lead to data driven program design and development decisions.
2. Maintain a secure hosting environment to provide required services.
3. Integrate eligibility, claims, biometric, provider, disease management, and clinical data from a variety of vendors that include, but are not limited to, health plans, pharmacy benefits manager, wellness administrator, and dental administrator.
4. Perform extensive data quality validation, have rigorous data cleansing processes, and have the flexibility to go beyond canned reporting.
5. Develop and maintain a user friendly, secure web-portal for ETF program administrators and other users.
6. Have application functionality that includes:

* Dynamic dashboard reporting
* Scorecards
* Automated reporting
* Trend analysis
* Comparison to comprehensive benchmarks
* Risk profiling/predictive modeling
* Analysis of disease severity
* Analysis of episodes of care
* Biometric and Health Risk Assessment (HRA) data integration
* Provider profiling
* Cohorts/population segmentation

1. Routinely review the GHIP/WPE program data and provide detailed reports and recommendations regarding areas where additional analysis may be warranted, the potential for reduction of costs may be identified, and important trends are identified.
2. Collaborate with key stakeholders on data-driven program strategies.

# 7.3 Phased-in Approach

At this time, the following phased-in approach for the DW-VBI Solution is anticipated. The actual timing will not be known until final decisions by the Board, and the results of additional procurement activities are known.

**Phase 1**

* Establish data transfer processes to load into the Data Warehouse the following data and subsequently refresh it on a monthly basis:
  + Membership and enrollment data from ETF, including data from the past three calendar years.
  + Medical claims from contracted health plans, including claims from the past three calendar years.
  + Pharmacy claims from the pharmacy benefits manager, including claims from the past three calendar years.
  + Biometric and HRA data from the wellness vendor.
  + Provider data from the contracted health plans.
  + Dental claims data from the dental benefit administrator, including claims from the past calendar year.
* Perform extensive data validation.
* Develop a web-portal for ETF program administrators.

**Phase 2**

* Develop dynamic and drillable dashboards for ETF program administrators and select end-users.
* Incorporate performance and quality measures as identified by ETF.
* Perform general data exploration and trending for reporting, evaluation, and outcome analysis.
* Evaluate providers by utilization, cost, and quality.
* Perform cost savings opportunity analysis.

**Phase 3**

* Enhance claims data for analysis and predictive modeling.
* Assess and improve treatment compliance and health outcomes via benefit design modifications.
* Evaluate potential member, provider, and safety outcome interventions.
* Analyze high cost utilizers, low cost utilizers, and non-utilizers for potential outreach and intervention.
* Explore the implementation and integration of select Electronic Medical Records (EMR)/Electronic Health Records (EHR) clinical data/values into the data warehouse for enhanced population health management analysis.

# Information Requested

Please review this RFI document and the attached two Excel files: a) Requirements Document, and b) Questionnaire. Vendors may provide responses for either the data warehouse or the visual business intelligence solution or both. Provide answers to the questions on the following page, in the Vendor Response Form. Please note:

In the Requirements Document:

1) Vendors providing information on a data warehouse solution only should review all sections/tabs except for the “VBI Requirements” section/tab.

2) Vendors providing information on a visual business intelligence solution only should review all sections/tabs except for the “DW Value Added Requirements” section/tab.

3) Vendors providing information on both the data warehouse solution and the visual business intelligence solution should review all sections/tabs.

In the Questionnaire:

1) Vendors providing information on a data warehouse solution only should review the Tab A – Data Warehouse Questionnaire and Tab C – DW & VBI Questionnaire.

2) Vendors providing information on a visual business intelligence solution only should review: Tab B – VBI Questionnaire and Tab C – DW & VBI Questionnaire.

3) Vendors providing information on both the data warehouse and the visual business intelligence solutions should review all three tabs.

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Department of Employee Trust Funds

P.O. Box 7931

Madison, WI 53707-7931

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| **Request for information (RFI)** ETF0056 Data Warehouse and Visual Business Intelligence Solution |

# Vendor Response Form

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| **A** | * Legal name and address of your company |  |  |
|  | * Name, telephone number, and email address of the person submitting this response |  |  |
| * A short description of your company’s general experience and qualifications with providing data warehouse and/or visual business intelligence solutions |  |  |

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| **B** | **Please review Section 7 of this RFI (High-Level Description of the Project). In your opinion, is the description understandable and clear? Please identify any areas that you consider unclear and the reasons why. Do you believe the future state of the project, as described in Section 7.2, is feasible? If not, why?** |
| Answer: |

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| **C** | **Please review the attached Requirements Document. In your opinion, are there any requirements that are restrictive and would unnecessarily decrease competition? Which ones? Why?** |
| Answer: |

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| **D** | **Please review the attached Requirements Document. In your opinion, which requirements, if any, could dramatically increase the costs for ETF to create and administer the DW-VBI Solution?** |
| Answer: |

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| **E** | **Please review the attached Requirements Document. In your opinion, which requirements, if any, do not reflect current industry standards? What do you perceive to be the industry standards for DW-VBI services/technologies?** |
|  | Answer: |

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| **F** | **Please review the attached Requirements Document. In your opinion, has ETF overlooked any requirements or industry standards that should be included to ensure ETF receives the best possible results from the RFP process? Please describe.** |
|  | Answer: |

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| **G** | **Please review all the documents provided with this RFI. To what degree do you believe it is feasible for one vendor to provide both data warehouse services and visual business intelligence services? Please explain.**  **In your opinion, is it preferable to have one vendor provide a data warehouse solution and another vendor provide a visual business intelligence solution? Why or why not? How would the vendors work together to provide ETF with the best possible solution?** |
|  | Answer: |

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| **H** | **Please review the attached Questionnaire. In your opinion, has ETF overlooked any questions that should be included to ensure ETF receives a good understanding of a vendor’s DW-VBI capabilities? Please list.** |
|  | Answer: |