



## REQUEST FOR SERVICES (RFS)



(ISSUED December 14, 2009)

**CONTRACT TITLE:** FIRST NATIONS PANORAMA DEPLOYMENT PLANNING: support for the continued efforts to implement a First Nation Public Health Immunization Information Management System (i.e. Panorama)

**CLOSING DATE:** Friday, January 8, 2010

**CLOSING TIME and TIME ZONE:** 5:00 pm EST

### **INTRODUCTION:**

On behalf of First Nations in Ontario, and in conjunction with First Nations and Inuit Health, Ontario Region (FNIH-OR), the Ontario Ministry of Health and Long Term Care (MOHLTC), the Chiefs of Ontario Office is seeking to contract an experienced team(s) to provide support in the following **two streams of activities:**

### **STREAM 1: BUSINESS PROCESS REDESIGN**

- business process redesign and reengineering
- change management
- business architecture analysis

### **STREAM 2: PRIVACY, EVALUATION AND INFORMATION GOVERNANCE**

- Privacy Impact Assessment and Risk Mitigation Strategy Development
- Project evaluation
- First Nation Information Governance

**Please note that this RFS is divided into two distinct areas.** Prospective bidders may bid on one or both of the Streams, and must clearly state to which Stream(s) they are submitting bids. If bidding on both sections of the RFS, the proposals must be presented separately. This will ensure that the RFS Review Committee will be able to select the best proposal for each of the Streams. These projects are inter-related and communication will be required between the successful bidder(s). This communication and overall project integration will be managed through the existing Integration Project Management Team for the Deployment of Panorama in First Nations in Ontario as an existing planning structure is already established. It is imperative that the activities conducted through this RFS be integrated and aligned with the broader planning agenda.

***Consideration during the selection process (as demonstrated by points) will be given to those bidders whose proposals demonstrate and facilitate knowledge translation and First Nation capacity development. Partnership proposals with First Nations organizations or individuals to complete these projects are strongly encouraged.***

## **BACKGROUND**

In June 2006, the All Ontario Chiefs Conference passed resolution 06/47 calling for the need to ensure that further work be done in the area of First Nation Public Health planning and health surveillance. In May 2007, funding resources were secured from the Aboriginal Health Transition Fund to support the Ontario First Nation Public Health Project (OFNPHP) which is an initiative that was established to assist in the development of a First Nation Public Health Framework for Ontario. OFNPHP is a First Nation driven, tri-partite initiative consisting of a dual-streamed process:

- To develop a joint relationship framework to oversee the definition, integration, and implementation of appropriate and effective Public Health programs and services to First Nations in Ontario; and,
- To establish a First Nation Public Health Immunization Information Management System (PHIIMS) strategy (now incorporating Panorama)

The focus of this RFS is on the second element of the OFNPHP Project, the development of a First Nation Information Public Health Immunization Information Management System Strategy. The Province of Ontario is planning for the implementation of the immunization and vaccine management components of Panorama, the chosen public health surveillance system. There will be only one instance of Panorama in Ontario, the one hosted and supported by the Province of Ontario. Initial Subscribers from among the First Nations in Ontario are also planning on implementing this tool. The successful planning and implementation of this integration opportunity is supported by a partnership that engages First Nation communities, FNIH-OR, the Ministry of Health and Long-Term Care and eHealth Ontario. Deployment of Panorama with 5 – 10 Initial Subscribers is planned to occur in conjunction with deployment to provincial Public Health Units. Activities related to the deployment of Panorama in First Nations communities are under the direction of the Knowledge Management Advisory Group (KMAG) and an Integration Project Management Team.

## **PROPOSAL SUBMISSION PROCESS**

1. You are invited to submit a brief (maximum of 5 pp) proposal submission for each Stream (maximum of 10 pp (2 x 5 pages) if submitting for both streams) outlining your understanding of the requirements for this project, including objectives, scope of work and how you will achieve the deliverables. Any information over the 5 pp limit (or 10 pages in the event that proposals for both streams are submitted) will not be considered during the review process. Bidders can submit proposals for one stream or both streams. Proposals for each stream will be reviewed separately, and therefore proposals for each Stream are independent and should be able to answer all required questions.
2. The proposal should not be a restatement of the information contained in the Statement of Work, but should demonstrate a fundamental understanding of the tasks outlined and a description of how the resources that you will provide will be able to achieve the

deliverables. A brief workplan/methodology must be included describing what activities will be undertaken to complete the project deliverables.

3. Your submission must also include an assessment of your proposed team against the competencies and qualifications necessary to complete the project.
4. Your budget outline must include a breakdown of activities by resource, number of days allocated, and per diem costs.

**DUE DATE:**

Submissions must be received by **Friday, January 8<sup>th</sup>, 2010 at 5 pm EST**. Proposals received after this time will be returned unopened.

Submissions can be directed via hardcopy, email or facsimile to:

Lori Jacobs, Executive Director  
Chiefs of Ontario  
111 Peter Street, Suite 804  
Toronto, Ontario M5V 2H1  
Fax: 416-597-8365  
or  
[lorijacobs@coo.org](mailto:lorijacobs@coo.org)

**FOR ADDITIONAL INFORMATION PLEASE CONTACT:**

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# **STREAM 1 BUSINESS PROCESS REDESIGN**

## **STATEMENT OF WORK**

**This stream contains three major deliverables:**

- ***Business process redesign (how will the use of Panorama change business processes at the community level?)  
Change management (how will that change be managed?)***
- ***Technical support to Information Technology and Data Management Working Groups (what do some of the changes look like from a business process architecture standpoint?)***

### ***Business Process Redesign and Change Management***

The Panorama Solution was built based on requirements provided by Canadian Jurisdictions. These jurisdictions have different ways of performing immunization services and managing inventory, and Panorama was built to handle this variety. The Province of Ontario has recently completed work with the Provincial Public Health Units to identify their specific Business Process requirements. A similar process is being envisioned for First Nation Initial Subscribers. An assessment, and redesign, of business processes in the Initial Subscriber communities will provide an early introduction to Panorama and an opportunity to provide input to how Panorama will be used. Business Process Redesign is a critical component of community engagement and will inform the Change Management, Implementation and Training Strategies.

It is anticipated that a team comprised of a business process redesign specialist, a change management specialist, and a technical analyst will be required to complete the deliverables as outlined below.

### ***Business Process Redesign Specialist and Change Management Specialist:***

1. Identify scope of processes used in Panorama; and plan activities based on this scope and proposed timeline.
2. Document and confirm future state process flows with input from key individuals from the Initial Subscriber communities, relevant stakeholders and partners and project team.
3. Coordinate and facilitate up to four (4) BPR Workshops to demonstrate and validate the key process flows.
4. Document the feedback in the BPR Report(s) with the Change Management Working Group and Technical Analyst. This includes feedback from the BPR Workshops with revised process flows and the steps to complete the processes.
5. Provide recommendations specifically related to the emerging training strategy including a Training Definition Plan that will outline all of the different Training Options for a community and how each community can best use the training resources and materials available to

effectively train their users. This deliverable will be based on the information derived from the BPR.

6. Develop an Implementation Strategy that specifically identifies the criteria for First Nation Secondary Subscribers; significant gaps that require attention; the type of implementation model to use; and the use of indicators to monitor the successfulness of the implementation.
7. Provide input into the Change Management and Communications Strategies, specifically related to key areas of change, the community's capacity to manage them, and subsequent information needs, communications methodologies, and engagement strategies.
8. Identify an appropriate change management approach to be applied to the project;
9. Assess the extent of the change and its impact on the organization(s);
10. Develop change management assessment tools to identify where First Nation users, organizations and sponsors/ leaders are on the change curve;
11. Assess the organization's readiness for change;
12. Assess First Nation users' readiness for change (as appropriate);
13. Identify areas where resistance is expected and develop appropriate response strategies;
14. Assess the change readiness of the sponsors/leaders and the development of appropriate tactics to enhance their roles;
15. Develop change management plans including communications, sponsorship, coaching, training and resistance management ;
16. Establish feedback processes to gather information to determine how effectively the change is being accepted.

### ***Technical Support***

A **Technical Analyst** will be required to provide technical analysis, design of process and architecture deliverables as part of supporting the KMAG Change Management Working Group (CMWG), the KMAG Information Technology Working Group (ITWG) and the KMAG Data Management Working Group (DMWG) activities. This work includes, but is not limited to the following activities:

1. Provide technical and business analysis support to the BPR activities for the documenting and modeling of business processes and their alignment to system processes
2. Provide technical and business analysis support to the CMWG team for the documenting and modeling of business processes and their alignment to system processes
3. Provide the ITWG with documentation and modeling expertise in establishing the current and future Service Management (User/System support) model(s) and processes
4. Provide the ITWG with service requirement analytical services for the development of appropriate Service Level Agreements
5. Support the ITWG in the development of the technical needs assessments, gap analysis and enhancement plans for Hardware, Software and Connectivity

6. Support the ITWG chair with daily working group management activities such as meeting logistics, note taking and project reporting
7. In coordination with the DMWG, provide technical and business analysis support for First Nation and Inuit Health Information System (FNIHIS) data quality, fit assessments, effort estimates and cleansing
8. In coordination with the DMWG, provide technical and business analysis support for FNIHIS data conversion activities, including extraction, transformation; load requirements and design modeling
9. In coordination with the DMWG, provide technical and business analysis support for FNIHIS data archive planning
10. Support the DMWG with the Quality Assurance plan for electronic or manual data conversion
11. Support the DMWG chair(s) with daily working group management activities such as meeting logistics, note taking and project reporting

## COMPETENCIES AND QUALIFICATIONS:

The following competencies and qualifications are required:

For ***business process redesign and change management*** deliverables:

- Knowledge and experience in working with/engaging First Nation organizations and individuals
- Proven knowledge and experience working with the Panorama application
- 5 years experience developing strategic and tactical plans for health care organizations
- 2 years experience engaging public health stakeholders in public health information system business process redesign and change management
- Proven ability to work with complex stakeholder relationships involving a variety of jurisdictions
- Proven experience using Project tools, project plans, and managing project status
- Proven experience with adult learning theories and strategies
- Proven experience working closely with communities to ensure business models align with community objectives
- Proven experience facilitating workshops that include a diverse group of stakeholders
- Proven ability to write and speak in simple, succinct English

For the ***technical analyst*** deliverables:

- Knowledge and experience in working with/engaging First Nation organizations and individuals
- Knowledge and experience with developing requirement and design documentation that support both the business and technical aspects of business and system processes

- Experience performing BPR support activities such as process modeling related to Panorama and its support architecture
- Experience performing Change Management support activities related to Hardware, Software and Connectivity requirements
- Experience in working with diverse stakeholder working groups in an eHealth context
- Experience developing detailed process and model documentation in support business and system processes

### **ESTIMATED COST AND DURATION - STREAM 1:**

The duration of this contract will be **January 25, 2010 – March 31<sup>st</sup>, 2010.**

The estimated cost will not exceed **\$165,000** including consultant travel.

The costs of the Business Process Redesign Workshops (for example, participant travel, venue rental, accommodation, etc) are not to be included in this bid and are covered under the First Nations Panorama Deployment funding.

## **STREAM 2 - PRIVACY, EVALUATION, AND INFORMATION GOVERNANCE**

### **STATEMENT OF WORK**

This stream contains three major categories of deliverables:

- ***The completion of a Logical Privacy Impact Assessment (PIA). This work will build upon and finalize the existing Conceptual PIA in preparation for the integration with the Province of Ontario's.***
- ***The development of an evaluation plan for the deployment of Panorama in the Initial Subscriber communities to assist in informing subsequent deployment.***
- ***The development a First Nations Information Governance framework to guide the use of Panorama.***

Specifically, the deliverables are as follows:

The ***Privacy Expert*** will:

- support the work of the Privacy and Data Management Working Group;
- Complete a Logical PIA focusing on First Nation and Federal involvement in the Ontario Panorama Initiative. This work will include:

- identification of any specific First Nation information governance issues that need to be identified and discussed
- a detailed analysis of federal legislative requirements versus provincial legislative requirements to identify potential privacy issues, and to support the development of any federal/provincial agreements required that will ensure that the federal government satisfies any requirements for due diligence under the *Privacy Act*
- identification of risks/risk mitigation strategies
- recommendations to First Nations and Health Canada related to policy/procedure development to mitigate privacy and security risks
- development of tools to meet privacy and security requirements and mitigate risk
- Work with the Provincial Privacy Team to integrate First Nation/Federal Privacy information into the Provincial PIA
- Identify requirements/content of any data sharing agreements required between the Federal and Provincial governments related to Federal Use of the Panorama application

The ***Evaluation Expert*** will support the Change Management Working Group (CMWG) to:

- Establish evaluation criteria and impact points through facilitated work sessions with KMAG;
- Build an evaluation framework and methodology based on the project leads, KMAG and IPM;
- Establish and implement a strategy for project evaluation baselines of impact points;
- Develop an evaluation process to evaluate criteria within framework, related to the baseline; and
- Conduct the evaluation and document recommendations for improving the implementation processes for the future Secondary Subscribers.

The ***Information Governance Expert*** will support the Privacy and Data Management Working Group to:

- Develop a framework for a First Nation information governance model which incorporates First Nation information governance requirements balanced with the other legislative and partnership needs as it relates to Panorama and the integrated immunization information repository

## **COMPETENCIES AND QUALIFICATIONS**

- Knowledge and experience with First Nations information governance issues including OCAP (Ownership, Control, Access and Possession)
- Experience and familiarity of working with First Nation communities/organizations/service providers
- Minimum 5 years of Privacy Analysis, with a proven track record of driving complex projects to successful completion
- Demonstrable experience in addressing privacy issues related to health information management systems
- Demonstrable experience in healthcare (or the public health sector) and/or government sector related to Privacy

- Excellent written and verbal communication skills
- Demonstrable experience in the development of successful risk mitigation strategies (desired)
- Ability to communicate complex concepts to senior executives and other project stakeholders (desired)
- 2 years experience developing and executing Health system related project or program evaluations measuring impact to service and outcomes, efficiency, efficacy, community impact and sustainability
- 5 years experience with process design and improving quality by improving processes;
- Demonstrated knowledge and understanding of common techniques used to evaluate projects or programs.

**ESTIMATED COST AND DURATION – STREAM 2:**

The duration of this contract will be **January 25, 2010 – March 31<sup>st</sup>, 2010.**

The estimated cost will not exceed **\$125,000** including consultant travel costs.