

**Proposal to Conduct
Consumer Experience of Care Surveys**

**Prepared for:
State of Vermont
Department of Vermont Health Access**



**Date:
September 16, 2010**

**Contact:
Allison Booker
Senior Vice President
410.721.0500
ABooker@WBandA.com**

TABLE OF CONTENTS

	<u>Page Number</u>
BIDDER INFORMATION SHEET	2
CORPORATE QUALIFICATIONS.....	3
A. Related Projects Conducted by WB&A Market Research.....	4
B. Experience and Qualifications of Proposed Staff.....	7
C. Key Personnel	7
REFERENCES	8
METHOD OF APPROACH TO THE SCOPE OF WORK	9
Task 1 – Project Management.....	9
Task 2 – Planning for Data Collection.....	10
Task 3 – Data Collection	11
Task 4 – Data Preparation and Submission.....	12
Task 5 – Reports	12
COST PROPOSAL	13
APPENDIX	
– Resumes of Key Staff	

BIDDER INFORMATION SHEET

Company Name:

Widener-Burrows & Associates, Inc. (WB&A Market Research)

Mailing Address:

2191 Defense Highway, Suite 401
Crofton, MD 21114

Federal ID Number:

52-2066294

Vermont Department of Taxes Business Account Number:

152007

Bid Amount:

\$51,000

Name and Title of Person Who Would Sign Contract:

Allison Booker
Senior Vice President

Contact Information:

Phone : 410.721.0500, ext. 882
Fax : 410.721.7571
Email : ABooker@WBandA.com

CORPORATE QUALIFICATIONS

Starting in November 1998, our experience in the health care industry and high standards of quality were recognized by the National Committee for Quality Assurance (NCQA), as WB&A was certified to conduct HEDIS[®]/CAHPS[®] Surveys. Since then WB&A has been one of a limited number of research firms to be re-certified by NCQA each year.

Starting in December 2006, our experience in the health care industry was again recognized by NCQA, as WB&A was certified to conduct the HEDIS[®] Medicare Health Outcomes Survey.

WB&A is a full-service, national market research firm, which currently has a full-time professional staff of 28 and a part-time staff of more than 100 employees. The company staffs an in-house project management team; this includes Research Directors, Research Managers, Research Associates, Professional Focus Group Moderators, a Director of Data Management, a Telephone Center Director, and a Field Director. In addition, our field staff includes in-house Telephone Interviewers, Interviewing Supervisors, a Coding Manager and two Coding Coordinators, Coders and Keypunchers.

WB&A was founded in 1987 with a strong commitment to quality research, and we work hard each day with a dedication to that same commitment. We are not the largest research firm around – and that is by choice. We find that our size provides us with a competitive advantage that our clients appreciate. We are large enough to organize and oversee the resources necessary to carry out large-scale research projects, and yet still small enough to have a hands-on approach to quality management, custom analysis and customer service.

As in any project, WB&A's focus is on the interests of our client on that engagement. WB&A strives to partner with our clients. This means that we work as an extension of their staff and as part of their organization. In this case, this means representing the interests and policies of the Department of Vermont Health Access (DVHA).

WB&A has interviewed hundreds of thousands of consumers and business decision-makers since its inception, utilizing a variety of methodologies. In the past three years alone, WB&A has conducted more than 200,000 telephone interviews, 750 focus groups, 1,000 in-depth interviews (in-person and telephone), 20,000 intercept interviews and distributed more than one million self-administered and mail surveys.

WB&A regularly compiles research data and information for a wide array of clients who have varied knowledge of market research. For our typical projects, the data collection is only the beginning. WB&A excels in helping the users make sense of the data and information collected. That means user-friendly reports, tailored to deliver the best information in the best format for the ultimate user. As one of our clients recently noted, "Studies were always completed on time within budget, with the final product being a report that all members of management found readable and useful."

WB&A is fully qualified to conduct the research outlined in this proposal. WB&A has significant expertise in conducting research in the health care industry, dating back to the company's inception in 1987. About one-third of WB&A's billings each year are in the health care industry. We routinely conduct both qualitative and quantitative research for many state agencies, managed care organizations/health insurance companies, health systems, physician practices, hospitals, home health care providers, hospices, skilled and long-term nursing care facilities, and assisted living facilities.

In particular, some of our previous and current health care industry clients include:

- Arizona Health Care Cost Containment System*
- Blue Cross Blue Shield of Delaware*
- Baltimore Medical System
- Blue Cross of Idaho
- CareFirst BlueCross BlueShield
- Commonwealth of Virginia*
- Delmarva Foundation for Medical Care, Inc.*
- Department of Health Services (State of California)*
- Health Services for Children with Special Needs, Inc. (HSCSN/NET)*
- Johns Hopkins Medicine
- Maryland Department of Health and Mental Hygiene*
- Maryland Health Care Commission*
- Maryland Hospital Association
- National Sleep Foundation
- North Arundel Hospital/Baltimore Washington Medical Center
- Office of Vermont Health Access*
- United Concordia Companies, Inc.

*Conducted CAHPS® research

WB&A has hands-on experience in conducting member satisfaction studies according to CAHPS® dating back to 1997. In 1997-1998, WB&A was chosen to team with a large health insurance company in Maryland to be an “early adopter” of CAHPS®. We conducted CAHPS® studies for this company, from sample manipulation and questionnaire revisions through analysis and reporting for internal purposes among Medicaid and Medicare populations.

Since then, WB&A has conducted numerous HEDIS®/CAHPS® studies for a variety of clients including state agencies and individual MCOs. *Specifically in the last several years, WB&A has administered the CAHPS® survey to adult and child Medicaid enrollees for the Maryland Department of Health and Mental Hygiene from 2001 to 2003 and again since 2008; for the Department of Health Services (State of California) from 2004 to 2007; for the Arizona Health Care Cost Containment System in 2006; for Health Services for Children with Special Needs from 2003 to present; for the Department of Vermont Health Access from 2006 to 2010; for the Commonwealth of Virginia from 2001 to 2005 and again in 2010; and for the Ohio Department of Job and Family Services from 2001 to 2003. WB&A has also administered the CAHPS® survey to adult Commercial enrollees for the Maryland Health Care Commission from 2008 to present; and for Blue Cross Blue Shield of Delaware starting in 2010.*

Related Projects Conducted by WB&A Market Research

As a result of being an NCQA-certified CAHPS® vendor, WB&A has a great deal of experience in conducting large-scale studies utilizing a mixed methodology (mail survey with CATI follow-up).

WB&A has distributed more than one million self-administered and mail surveys and processed more than 250,000 returned surveys in the last three years. We have extensive experience in administering virtually all aspects of large-scale mail surveys from coordinating printing to supervision of mail houses to tracking and processing returns.

WB&A has 85 CATI stations to efficiently conduct interviewing over the telephone. Operating at capacity, a total of more than 1,500 interviewing hours can be completed each week.

The following table illustrates just some of WB&A’s experience in conducting CAHPS® research as well as projects among providers:

Client	Description of Project/Methodology
State Agency - Vermont	<p>A Consumer Assessment of Healthcare Providers and Systems (CAHPS®) among adult members of the DVHA Medicaid Program. This study was conducted according to the CAHPS® protocol. Interviews were completed with qualified respondents.</p> <p>WB&A was responsible for the development of a survey management system, pre-notification letter, two mailings of the questionnaire with Forwarding Address Correction requested and WB&A’s toll-free number included in the cover letter, one follow-up postcard mailing, administering the CAHPS® Adult Medicaid telephone instrument (with the addition of supplemental questions) via CATI to non-responders to the mail survey, editing, coding, keypunching/verification, data processing/tabulations and submission of the data to NCBD.</p>
State Agency - Vermont	<p>A Consumer Assessment of Healthcare Providers and Systems (CAHPS®) among consumers of the Vermont Chronic Care Initiative. This study was conducted according to the CAHPS® protocol. Interviews were completed with qualified respondents.</p> <p>DVHA was responsible for the development of a survey management system, pre-notification letter, two mailings of the questionnaire with Forwarding Address Correction requested and WB&A’s toll-free number included in the cover letter, one follow-up postcard mailing, administering the CAHPS® Adult Medicaid telephone instrument (with the addition of supplemental questions) via CATI to non-responders to the mail survey, editing, coding, keypunching/verification, data processing/tabulations and submission of the data to NCBD.</p>
State Agency – Maryland	<p>A Consumer Assessment of Healthcare Providers and Systems (CAHPS®) among adult and child members of the seven contracted Medicaid MCOs (14 samples) for the State of Maryland Medicaid Program. This study was conducted according to the CAHPS® protocol. Interviews were completed with qualified respondents – both adult and child members of each plan were represented in the study.</p> <p>WB&A was responsible for pulling the random sampling frame, de-duping the lists by address, development of a survey management system, two mailings of the questionnaire with Forwarding Address Correction requested and WB&A’s toll-free number included in the cover letter, two mailings of follow-up postcards, administering the CAHPS® core Medicaid (adult and child) telephone instrument (with the addition of supplemental questions) via CATI to non-responders to the mail survey, editing, coding, keypunching/verification, data processing/tabulations and submission of the data to NCQA & NCBD.</p> <p>WB&A was responsible for analyzing the results and developing the report for internal purposes. The reporting format followed suggested CAHPS® protocol for analysis, but was customized to address the State’s quality improvement efforts.</p>
Health Insurance Plan in DC	<p>A Consumer Assessment of Healthcare Providers and Systems (CAHPS®) among <i>Medicaid</i> child members. This study was conducted according to the CAHPS® protocol by administering the CAHPS® Medicaid survey with CCC using the mixed methodology. Interviews were completed with qualified parents/guardians of child enrollees.</p> <p>WB&A was responsible for pulling the random sampling frame, de-duping the lists by address, sending a personalized advance letter with Forwarding Address Correction requested and WB&A’s toll-free number included, administering the CAHPS® core Medicaid MCO telephone instrument (with the addition of supplemental questions) via CATI to non-responders to the mail survey, editing, coding, keypunching/verification, data processing/tabulations and submission of the data to NCQA & NCBD.</p> <p>WB&A was responsible for analyzing the results and developing the report for internal purposes. The reporting format followed suggested CAHPS® protocol for analysis, but was customized to address the plan’s quality improvement efforts.</p>

Client	Description of Project/Methodology
State Agency – Maryland	<p>A Consumer Assessment of Healthcare Providers and Systems (CAHPS[®]) among adult Commercial members for the State of Maryland. This study was conducted according to the CAHPS[®] protocol. Interviews were completed with qualified respondents – both HMO/POS and PPO enrollees were represented in the study.</p> <p>WB&A was responsible for pulling the random sampling frame, de-duping the lists by address, development of a survey management system, two mailings of the questionnaire with Forwarding Address Correction requested and WB&A’s toll-free number included in the cover letter, two mailings of follow-up postcards, administering the CAHPS[®] core Commercial telephone instrument (with the addition of supplemental questions) via CATI to non-responders to the mail survey, editing, coding, keypunching/verification, data processing/tabulations and submission of the data to NCQA.</p> <p>WB&A was responsible for analyzing the results and developing the report for internal purposes. The reporting format followed suggested CAHPS[®] protocol for analysis, but was customized to address the State’s quality improvement efforts.</p>
State Agency – Virginia	<p>A Consumer Assessment of Healthcare Providers and Systems (CAHPS[®]) among adult and child members of the Fee-For-Service Medicaid programs in the Commonwealth of Virginia. Interviews were completed with qualified respondents – both adult and child members of the program are represented in the study.</p> <p>WB&A was responsible for pulling the random sampling frame, de-duping the lists by address, development of a survey management system, two mailings of the questionnaire with Forwarding Address Correction requested and WB&A’s toll-free number included in the cover letter, two mailings of follow-up postcards, administering the CAHPS[®] Medicaid (adult and child) telephone instrument (with the addition of supplemental questions) via CATI to non-responders to the mail survey, editing, coding, keypunching/verification, data processing/tabulations.</p> <p>In addition, WB&A was responsible for the analysis/reporting for internal use by the Department and the participating programs.</p>
State Agency – California	<p>A Consumer Assessment of Healthcare Providers and Systems (CAHPS[®]) among adult and child members of the contracted Medicaid MCPs (60 samples) for the State of California. This study was conducted according to the CAHPS[®] protocol. Interviews were completed with qualified respondents – both adult and child members of each plan were represented in the study.</p> <p>WB&A was responsible for pulling the random sampling frame, de-duping the lists by address, development of a survey management system, two mailings of the questionnaire with Forwarding Address Correction requested and WB&A’s toll-free number included in the cover letter, two mailings of follow-up postcards, administering the CAHPS[®] core Medicaid telephone instrument via CATI to non-responders to the mail survey, editing, coding, keypunching/verification, data processing/tabulations and submission of the data to NCQA.</p> <p>In addition, WB&A was responsible for the analysis/reporting for internal use by the Department and the participating plans.</p>

B. Experience and Qualifications of Proposed Staff

WB&A Market Research has a team of highly experienced and qualified research professionals with expertise in administering HEDIS[®]/CAHPS[®] surveys. The project staff that would be assigned to this contract is very knowledgeable of the ins and outs of the CAHPS[®] survey process as well as the organizational structure involved in managed care assessment programs. Each staff member for this contract has experience in conducting large-scale satisfaction survey projects both in the area of HEDIS[®]/CAHPS[®] as well as various ad hoc projects.

Beginning in November 1998, WB&A Market Research became one of a limited number of research firms to be certified by the National Committee for Quality Assurance (NCQA) to conduct HEDIS[®]/CAHPS[®] Surveys. Since then WB&A has continued their certification with NCQA and will continue to do so.

Each year as part of the certification process, NCQA requires several key staff members to attend a formal training program. To date, Ms. Booker, Ms. Henley, Ms. Freeman and Mr. George have completed the required formal training program. Based on the material covered in NCQA's training program, Ms. Booker, Ms. Henley and Ms. Freeman will conduct various mini-training sessions with key staff members involved in the CAHPS[®] survey administration.

C. Key Personnel

WB&A's President, Steve Markenson, is actively involved in issues related to everyday project management. He provides strategic direction, supervision and quality control for all of the company's clients and projects.

Steve brings many years of diversified market research experience to each project. In addition to Steve's contribution, Allison Booker and Renée Henley, Senior Vice Presidents, are responsible for directing the health care project management staff in accurately and efficiently completing projects. They are the most senior health care staff members with the most extensive health care market research experience. Both have been with WB&A for more than fourteen years. They will serve as the Project Directors. In addition, we have a number of Research Directors and Managers who have experience in conducting health care research.

To manage WB&A's daily activities, we find that the best organizational approach is to create departments around functions such as data collection, data processing, project management, administration, etc. While day-to-day management with the client is handled by the health care research team, they work internally with other WB&A department managers, including Susan Landis, Senior Vice President of Administrative Services; Deirdre Kurzweil, Telephone Center Director; Kristen Edsall, Field Director; Terry Doscher, Coding Director; and Jeff George, Director of Data Management, to coordinate all aspects of these research projects.

Clear communication is ensured through our weekly project meetings. During these project meetings, department staff report progress of the survey at its various stages and discuss next steps jointly. This meeting enables the entire WB&A team to work together to ensure that each step will come together with the succeeding steps throughout the survey administration. WB&A's internal CAHPS[®] calendar allows project staff to ensure the timeliness and completion of each step throughout the survey process.

Resumes of all key staff are in the Appendix.

REFERENCES

Department of Vermont Health Access

Russell Frank
312 Hurricane Lane, Suite 201
Williston, VT 05495
802.879.5932

Project Administration: Allison Booker

Type of service provided: CAHPS® survey research among adult enrollees of the DVHA Medicaid Program as well as among consumers of the Vermont Chronic Care Initiative.
(For a more detailed description, please see “Related Projects Conducted by WB&A Market Research.”)

Period of performance: 2006 to 2010

State of Maryland

Glendora Finch
Department of Health and Mental Hygiene
201 W. Preston Street, Room 208
Baltimore, MD 21201
410.767.1687

Project Administration: Allison Booker

Type of service provided: CAHPS® 2.0H/3.0H survey research among adult and child members of the State Medicaid Program, HealthChoice.
(For a more detailed description, please see “Related Projects Conducted by WB&A Market Research.”)

Period of performance: 2001 to 2003 and 2007 to Present

Delmarva Foundation for Medical Care

Martha Burton
6940 Columbia Gateway Drive, Suite 420
Columbia, MD 21046
410.872-9660

Project Administration: Allison Booker

Type of service provided: CAHPS® survey research among members of the Medicaid Fee-For-Service Programs.
(For a more detailed description, please see “Related Projects Conducted by WB&A Market Research.”)

Period of performance: 2010

METHOD OF APPROACH TO THE SCOPE OF WORK

Based on specifications listed in the RFP, the description of services needed include administering the following consumer experience of care surveys:

- Child CAHPS Health Plan Survey 4.0 Medicaid Version (completed by June 2011 and possibly June 2012);
- CAHPS-like survey among consumers participating in the Vermont Chronic Care Initiative (completed by December 9, 2011); and
- Adult CAHPS Health Plan Survey 4.0 Medicaid Version (completed by June 2012).

In addition to administering the CAHPS[®] surveys, the selected vendor will also be responsible for submitting survey data to the National CAHPS Benchmarking Database (NCBD).

What follows is WB&A's Proposed Survey Work Plan for administering the consumer experience of care surveys in accordance with the survey tools and general methodology of the CAHPS[®] program.

Task 1: Project Management

The tentative time frame for administering the 2011 CAHPS[®] survey (among child enrollees) under this contract is outlined below. Timing for future surveys will be similar. This timeline can be adjusted at the project kick-off meeting.

	Date
Project kick-off meeting/conference call	TBD after awarded contract
Format and finalize survey materials	By March 8
Print survey materials	March 9 – 18
Sample files to WB&A	March 14
Send pre-notification letter	April 4
Send first questionnaire and cover letter to the member	April 11
Send reminder postcard (one week after first questionnaire)	April 18
Send second questionnaire and cover letter to non-responders	May 9
Follow-up with telephone interviewing, if necessary	May 30 – June 12
Weekly status reports to DVHA	Ongoing during data collection
Submit data to NCBD	TBD
Report and member-level data files to DVHA	July 15

WB&A will provide weekly progress reports to DVHA detailing response rates, as well as other pertinent information.

Task 2: Planning for Data Collection

The first step to conduct this research is developing the core documents comprising the mail protocol (pre-notification letter, questionnaires, postcards and letters), which are provided by CAHPS[®]. The questionnaires for this research will be the current adult and child CAHPS[®] 4.0 Medicaid surveys as well as a CAHPS-like which was previously created for consumers participating in the Vermont Chronic Care Initiative.

As stated in the RFP, supplemental questions will be added to the Child CAHPS survey, particularly questions pertaining to dental care, access to a specialist, and care coordination from other health care providers. It is currently undecided whether supplemental questions will be added to the Adult CAHPS survey. All documents will be customized with the DVHA name and logo.

Upon approval of all core documents by DVHA, WB&A will be responsible for reproducing sufficient numbers of the pre-notification letter, questionnaire, cover letter, reminder/thank you postcard, outbound envelopes for the survey packages and business reply envelopes.

Sampling

WB&A will work with DVHA to receive an electronic enrollment file of eligible members. These enrollment files should follow a standardized sample frame layout, which WB&A will provide. WB&A recommends that the membership file be in accordance with CAHPS[®] data file elements and sampling guidelines from which to pull the sample. It is important to note that the sample frame from the DVHA should include both those who *do and do not* have telephone numbers and/or addresses on file. This will help ensure that the sample surveyed is representative of the total population of members.

For the child CAHPS survey, child enrollees for sampling include current members at the time the sample is drawn and age 17 years and younger (as of December 31st of the reporting year), and who have been enrolled continuously for five of the last six months (using the planned start date of data collection to determine the six months). WB&A recommends that the sample frame is sorted by address and de-duped by household so that only one adult member per household is included in the sample.

For the adult CAHPS and CAHPS-like surveys, adult enrollees eligible for sampling include current members at the time the sample is drawn and age 18 years and older (as of December 31st of the reporting year), and who have been enrolled continuously for five of the last six months (using the planned start date of data collection to determine the six months). WB&A recommends that the sample frame is sorted by address and de-duped by household so that only one adult member per household is included in the sample.

Based on the RFP, DVHA will be responsible for “pulling” the sample. Once the data files have been received, WB&A will initially review the files to confirm the reliability of the sample frame through data verification tests of the data file elements, as well as to ensure that they are properly set-up, can be read, etc.

Survey Management System

WB&A will format each sample frame as a database. Each member will be assigned a unique record number or WB&A ID number, so that completed interviews are tracked only by their assigned WB&A ID number (and cannot be linked by the plan to any confidential information received from the health plan such as member number or social security number). The database will be utilized to keep track of who has or has not responded to the survey, response rates to each phase, as well as updating addresses, telephone numbers, etc. WB&A will provide weekly progress reports to DVHA detailing response rates, as well as other pertinent information.

Task 3: Data Collection

The primary method of data collection will consist of mailing a pre-notification letter, two survey packages and a reminder postcard to sampled members with telephone follow-up to those not responding by mail.

Survey Protocol
Send pre-notification letter to the member
Send first questionnaire with cover letter to the member
Send a postcard reminder to <u>non-respondents</u>
Send a second questionnaire with second cover letter to <u>non-respondents</u>
Initiate telephone interviews for <u>non-respondents</u> after mailing the second questionnaire

Optimizing Response Rates

WB&A will take all appropriate actions to get as many members as possible to respond in an attempt to meet the required minimum response rate of 50%.

While some processes for attempting to reach the sampled members are standard CAHPS[®] procedures, WB&A will continue to include other special processes in our recommended approach because we have found them to be instrumental in successfully completing surveys. In brief, all mail packages are sent with the designation of “Return Service Requested.” The postal service will use this designation to send all undeliverable mail through the NCOA (National Change of Address) file and will return the piece to WB&A with a new matched address if available. Addresses are then updated daily and packages are re-mailed. WB&A utilizes other “physical” search sources such as crisscross directories or address CD-ROM, Internet sources, etc. on a case-by-case basis if there is no address from the plan or no match through NCOA.

Appending Telephone Numbers

WB&A will send the file of all the non-respondents to the mail portion of the study to a telephone number matching service. The service will return the entire file with both matched and unmatched records. We will leave any numbers that were sent in the original file so that both the original number and the telematched number can be attempted. In addition, WB&A will try to find telephone numbers for any unmatched records that are pulled for the sample frame through “physical” use of directory assistance and/or telephone/address databases, CD-ROMs, Internet search engines, etc.

CATI Interviewing

Given the nature of the membership, the CATI interviewing will be conducted from 10:00 a.m. to 9:00 p.m. weekdays, from 10:00 a.m. to 2:00 p.m. Saturday, and from 4:00 p.m. to 8:00 p.m. Sunday. Interviewers will attempt each available number up to ten times, on different days and during different times of day. According to NCQA/ CAHPS[®] guidelines, at least 10% of the interviews will be monitored by the Project Director, Telephone Center Director and/or data collection supervisors to ensure proper interviewing techniques such as reading verbatim, probing and clarifying, interviewer demeanor, etc. Any problems will be noted verbally to the interviewer as well as in writing. Any interviewer who jeopardizes the quality of the research or production rate will be removed from the project. In addition, on-site or remote monitoring by DVHA staff is available.

All interviewing will be conducted by WB&A’s professional telephone interviewing staff. WB&A maintains 85 CATI-equipped interviewing stations between our offices in Crofton, MD and Ithaca, NY. WB&A has over 80 part-time interviewers; many who have been on staff for years.

Some examples of our quality control procedures include:

- Telephone interviewing training – After meeting our strict hiring requirements, all interviewers must go through an extensive five-day training program. After completion of this program, they are considered interviewer trainees during which time they are monitored closely by supervisors.
- Telephone interviewers briefing – Upon the beginning of a project, all interviewers are briefed by the study director and are not only monitored by supervisors but also by the study director. At least 10% of all interviews are monitored by a supervisor and/or study director.
- Telephone interviewing supervision – WB&A has a total of 85 CATI stations, in addition to the Telephone Center Directors and Project Manager (technical lead), who are on-site monitoring during interviewing. This level of supervision decreases the amount of error throughout the execution of this type of project.

Member Confidentiality and Quality Control Measures

Regarding patient confidentiality, it is important to note that WB&A abides by all HIPAA, NCQA and CASRO guidelines. WB&A will provide documentation of internal policies and procedures that are in place to assure that all confidential, individual enrollee information and proprietary health plan information is safeguarded during the entire survey process. WB&A will comply with all confidentiality requirements set forth by DVHA which includes executing a HIPAA Business Associate Agreement with DVHA.

In addition, in order to ensure member confidentiality as well as the confidentiality of health plans data, all WB&A employees and vendor partners who have contact with the member lists are required to sign a confidentiality agreement. And, as required by NCQA, the member names selected for the survey sample will not be divulged to DVHA. Member responses to interviews will be entered into a different database than the member database that will be utilized for tracking completed interviews (i.e., only the confidential tracking ID will link the data file to the master file containing the patient information). Finally, WB&A will abide by any additional standards that DVHA may have regarding patient confidentiality.

WB&A will adhere to the Quality Assurance Plan document that we submitted to NCQA in carrying out the HEDIS[®]/CAHPS[®] protocol. The Quality Assurance Plan provides a reasonable depiction of the systems, protocols and processes needed to ensure that all survey specifications are met as well as how quality is managed throughout the survey administration. In addition, this document addresses any anticipated problems as well as solutions to these problems. Our Quality Assurance Plan has been approved for meeting all NCQA standards.

Task 4: Data Preparation and Submission

At the end of the survey administration, WB&A will be responsible for running the data cleaning/validity tests and interview completion status tests.

WB&A will be responsible for submitting survey results to the National CAHPS Benchmarking Database (NCBD) in the preferred format required by the requesting organization. WB&A will also provide final data files to DVHA.

Task 5: Reports

After each survey, WB&A will provide a report to DVHA that includes:

- Brief description of the sample frame size;
- Adjusted response rate calculations;
- Timeline showing project milestones; and
- The date that NCBD approved/accepted the member-level data file.

According to the RFP, data analysis is not required.

COST PROPOSAL

WB&A Market Research certifies that the costs associated with conducting the Consumer Satisfaction Surveys were arrived at without any conflict of interest.

The costs associated with the various tasks/components of this study are as follows:

	<i>Child CAHPS (2011)</i>	<i>Adult Chronic Care (2011)</i>	<i>Adult CAHPS (2012)</i>	<i>Child CAHPS (2012)</i>
<u>Variable Costs</u>				
Printing (pre-notification letter, questionnaire, postcard, outbound envelope, BRE, etc.)	\$2,000	\$2,000	\$2,000	\$2,000
Outbound mail processing, including CASS and address correction	3,000	3,000	3,000	3,000
Outbound/inbound postage	1,750	1,750	1,750	1,750
Keypunch/verify mail surveys	500	500	500	500
CATI interviews	1,750	1,750	1,750	1,750
Telematch/telephone number look-up	300	300	300	300
Miscellaneous (copies/fax/messenger/delivery etc.)	<u>100</u>	<u>100</u>	<u>100</u>	<u>100</u>
Subtotal Variable Costs:	\$9,400	\$9,400	\$9,400	\$9,400
<u>Fixed Costs</u>				
Format questionnaire/mail pieces with health plan name	\$100	\$100	\$100	\$100
CATI programming and testing	500	500	500	500
Inbound mail processing	500	500	500	500
Data processing, develop member-level data file, etc.	750	750	750	750
Project management/quality control	<u>1,500</u>	<u>1,500</u>	<u>1,500</u>	<u>1,500</u>
Subtotal Fixed Costs:	\$3,350	\$3,350	\$3,350	\$3,350
Total Estimated Project Costs*:	\$12,750	\$12,750	\$12,750	\$12,750

TOTAL ESTIMATED CONTRACT COSTS*: \$51,000

**Because it is impossible to estimate variable expenses with complete accuracy, this estimate is subject to a ±10% contingency.*

APPENDIX

- Resumes of Key Staff

RESUMES OF KEY STAFF

Steven T. Markenson, President

Steve joined WB&A in 1996 and was named President in 1997. In addition to his role overseeing all corporate management, as well as building and sustaining successful client relationships, Steve also stays actively involved in issues related to everyday project management. He provides strategic direction, supervision and quality control for all of the company's clients and projects.

Steve has been working in market research since 1987 and has been employed with national research firms including Yankelovich Partners and Opinion Research Corporation. He has expertise in conducting large-scale, quantitative projects that involve advanced statistical analyses such as market segmentation, cluster analysis, multiple regression and trade-off techniques. In addition, Steve is a professional focus group moderator.

As previous Director of Research for Snyder Communications, Steve directed the market research projects for many Fortune 1000 clients, including Procter & Gamble, The Kellogg Company, McNeil Consumer Healthcare, American Express, Bayer Corporation, The Quaker Oats Company and Kraft Foods.

Through his career, Steve has worked with a wide array of companies in a variety of industries; such as Merrill Lynch, Discover Card, PNC Bank, Bank of America, CareFirst BlueCross BlueShield, Johnson & Johnson, Metropolitan Washington Airports Authority (MWAA), Washington Metropolitan Area Transit Authority (WMATA), New York MTA, Washington Gas, National Public Radio (NPR), AAA and many others.

Steve graduated Cum Laude with a bachelor's degree in Economics and Business from the University of Pittsburgh. He is an active member of the American Marketing Association (AMA) and the Marketing Research Association (MRA), and is also among the first to be certified at the Expert level by the Marketing Research Association's *Professional Researcher Certification* program. Steve has been a guest lecturer at Johns Hopkins University, Georgetown University, Loyola College in Maryland and American University. He is an Adjunct Professor at the Kogod School of Business at American University.

Allison S. Booker, Senior Vice President

Allison Booker is responsible for client development (i.e., sales and relationship building) with WB&A's health care clients. She also continues to serve as a primary contact for many of the company's health care projects by developing recommended methodologies, managing data collection and processing, analyzing the data and presenting the results.

Allison has extensive experience conducting custom quantitative and qualitative research covering a wide variety of research methods, including telephone surveys, focus groups, one-on-one executive interviewing, intercept interviews, online surveys and other mail/self-administered surveys.

In addition to her experience conducting custom research, Allison also has extensive experience conducting all HEDIS/CAHPS[®] surveys (for which she has participated in the required formal training provided by the National Committee for Quality Assurance – NCQA). She has been involved in conducting HEDIS/CAHPS[®] studies and has attended various workshops and conferences since 1996.

Some of Allison's past and present clients include CareFirst BlueCross BlueShield, Delmarva Foundation for Medical Care, Inc., Maryland Department of Health & Mental Hygiene, Maryland Health Care Commission, Johns Hopkins Medicine, United Concordia Companies, Inc., Baltimore Medical System, Maryland Hospital Association, Baltimore Washington Medical Center, Arizona Health Care Cost Containment System, Blue Cross of Idaho and California's Department of Health Services.

Allison joined WB&A in 1996 after working in marketing since 1993. She has a Bachelor of Science degree in Business Administration with a concentration in Marketing from Shippensburg University.

Allison is a member of the American Marketing Association, Marketing Research Association, DC Ad Club and the Maryland Society for Health Care Strategy and Market Development, along with various other health care associations and organizations. She is also among the first to be certified at the Expert level by the Marketing Research Association's *Professional Researcher Certification* program.

S. Renée Henley, Senior Vice President

Renée Henley is responsible for overseeing WB&A's project management, data processing and coding processes to ensure the accurate and efficient completion of projects. She also continues to serve as Project Manager and primary contact for many of the company's clients by defining issues, developing recommended methodologies, managing data collection and processing, analyzing the data and presenting the results. In addition, Renée is a professional focus group moderator, having moderated hundreds of groups since 1999.

Renée has extensive experience conducting custom quantitative and qualitative research covering a wide variety of research methods, including telephone surveys, focus groups, one-on-one executive interviewing, intercept interviews, online surveys and other mail/self-administered surveys.

A small sampling of some of Renée's past and present clients include National Public Radio (NPR), the Metropolitan Washington Airports Authority (MWAA), Baltimore/Washington International Thurgood Marshall Airport (BWI), the Washington Metropolitan Area Transit Authority (WMATA), Choice Hotels International and the International Dairy Foods Association (IDFA). She is very knowledgeable about major industry trends and client issues, so her conclusions and recommendations are valid and actionable.

Renée joined WB&A in 1994 after graduating Magna Cum Laude from the Morrissy Scholar Honors Program at the College of Notre Dame of Maryland, where she earned a Bachelor of Arts degree in Business Administration with a concentration in Marketing and a French minor. In 1998 she successfully completed the Marketing Research certification program offered by the University of Georgia and the Marketing Research Association.

Renée is a member of the Marketing Research Association (MRA) and is a past Vice President of Membership for the Baltimore Chapter of the American Marketing Association (AMA). She is also among the first to be certified at the Expert level by the Marketing Research Association's *Professional Researcher Certification* program. Renée is a frequent lecturer at many local colleges and universities. Most recently, she has spoken in front of undergraduate and graduate classes at Johns Hopkins University, Loyola College in Maryland and American University.

Betsy Freeman, Research Associate

Betsy Freeman joined WB&A as a Research Associate in June 2009. As a member of the Project Management team, Betsy is involved in many of the components of the research process, including updating and editing client reports for clarity, monitoring the status of quantitative fieldwork, editing questionnaires, testing CATI programs and checking cross-tabulations for accuracy. Betsy graduated from Juniata College with a Bachelor of Science in Mathematics and a minor in Finance.

Bethany Black, Research Associate

Bethany Black joined WB&A as a Research Associate in June 2010. As a member of the Project Management team, Bethany is involved in many of the components of the research process, including updating and editing client reports for clarity, monitoring the status of quantitative fieldwork, editing questionnaires, testing CATI programs and checking cross-tabulations for accuracy. Bethany graduated from Grove City College where she earned a Bachelor of Science in International Business with a concentration in Marketing and French major.

Jeff George, Director of Data Management

Jeff manages WB&A's entire data processing function, including supervising and educating the Data Processing staff. In addition, Jeff continues to participate in the day-to-day operations of the department, programming CATI and web-based studies, preparing surveys for data entry, setting up data entry programs and preparing cross-tabulations of survey results. He works closely with the Project Management team and Field staff to ensure that the project goals are achieved accurately and efficiently.

In addition, Jeff has significant experience using advanced analytic techniques such as regressions, correlations, key driver analysis and factor analysis, helping the Project Management team delve deeper into the data and provide actionable results.

Jeff is also the administrator for the Linux-based networks that house the CATI and web survey systems.

Jeff joined WB&A Market Research in February 2000 after a 10-year employment at Public Opinion Research, Inc., where he was involved in all phases of the survey process. Primarily, he worked as Chief Data Processor and Project Manager. This position gave him first-hand experience in the collection of data through the interviewing process, CATI programming and script writing, data collection from a CATI system, analysis of results and report writing.

Jeff graduated Summa Cum Laude from Towson State University with a Bachelor of Science in Psychology. He has completed the Principles of Marketing Research course offered by the University of Georgia. Jeff is certified at the Expert level by the *Professional Researcher Certification* from the Marketing Research Association (MRA).

Susan Landis, Senior Vice President, Administration and Finance

Susan Landis, Senior Vice President, Administration and Finance, is responsible for accounting (payroll, payroll taxes, A/R, A/P), costing and proposals, document production, human resources and purchasing. She oversees an administrative staff that works as a team to support project management, two telephone centers, field department, coding and data processing. Susan also coordinated office moves, renovation of office space, and is the company contact with the property managers of the facility.

Susan joined WB&A in 1994 having previously worked as Office Manager for Gannett Fleming, Inc., a national engineering consulting firm. Her duties included assisting the Project Directors with all of the clerical/administrative tasks for several large government contracts for which Gannett was a subcontractor.

In addition, she is credited with more than twenty-nine years of experience in office management, with emphasis on support staff supervision, document production, human resources administration, payroll, accounts payable and accounts receivable.

Susan has a Bachelor of Arts degree, Summa Cum Laude, in Public Administration from the University of Pittsburgh.

Terry Doscher, Director of Coding Services

Terry Doscher is responsible for overseeing the entire coding function at WB&A. In particular, she is responsible for managing, training and delegating work to the Coding staff, as well as codebook development, tracking and delivery of coded surveys to the Data Processing Department, developing briefing notes for the Field Department, and editing field work.

Terry clearly understands the importance of collecting high quality, reliable, clear information and has developed excellent skills in recognizing the subtle nuances of responses to open-ended questions, both of which are essential to delivering a quality product to clients.

Terry joined WB&A in 1990 as part of the Field Department interviewing and coding staff. She was promoted to Coding Supervisor in 1994, was made Coding Manager in 2000, and then advanced to Director of Coding Services in 2004. She has recently achieved Professional Researcher Certification status with the MRA. Prior to joining WB&A, Terry worked for nine years at NBC in New York, first as a Scheduling Coordinator for camera crews and video editors and later as an Electronic Journalism Editor and one of the department supervisors.

Terry holds a Bachelor's degree in Theater Arts/Dance from Marymount Manhattan College and has done graduate work at the New School for Social Research in Corporate Media.

Kristen L. Edsall, Field Director

Kristen Edsall manages the study coordination and data collection for all field methodologies including focus groups, on site/intercept studies, in-depth interviews and mail studies. Her primary role is to ensure that projects are properly staffed and to monitor the flow of work so that resources can be appropriately allocated and projects finished in a timely manner and within the allotted budget.

Kristen has a wide range of management experience in different industries and with a variety of "non-traditional" research methods from intercept studies at airports, banks, and on buses to recruiting cardiologists, military officers and CEOs for focus groups. She works with such client names as the Metropolitan Washington Airports Authority (MWAA), Maryland Aviation Administration (MAA) and Thurgood Marshall-Baltimore Washington International Airport (BWI), Washington Metropolitan Area Transit Authority (WMATA), the Maryland Transit Administration (MTA), The Maryland-National Capital Park and Planning Commission (MNCPPC), Bank of America and the State of California.

Kristen directs a group of on-site interviewers adept at conducting all types of interviews with a variety of respondent groups. Kristen manages up to 100 studies per year.

Kristen graduated Summa Cum Laude from Salisbury State University with a bachelor's degree in Communication Arts and Marketing. She joined WB&A in 1996 and has been in the role of Field Director since 1998.

Deirdre Kurzweil, Telephone Center Director

Deirdre has been in the market research field since 1989. She rejoined WB&A Market Research in 2006 to open and manage its new Telephone Interviewing Facility in Ithaca, New York. From 1997 through 2001, Deirdre served as Senior Vice President at WB&A, where her responsibilities included overseeing all aspects of operations, including data collection, programming and data processing.

For the past several years, Deirdre has been actively involved in The Council for Marketing & Opinion Research's (CMOR) efforts to improve respondent cooperation, attending conferences and meetings, and serving on committees. Through its annual Respondent Cooperation Workshop, CMOR strives to evaluate the public's perceptions of the research process, to measure the effects of alternative methods of improving respondent cooperation, and to provide a foundation upon which to build an improved set of industry guidelines. Through her efforts, Deirdre has kept WB&A in the forefront on these important issues facing our industry.

Before returning to WB&A in 2006, Deirdre worked for Cornell University as the manager of the Survey Research Institute, as well as Market Research Manager for the Office of Publications and Marketing.

During her career, Deirdre also served as a Research Director at Opinion Research Corporation and Total Research Corporation, two New Jersey-based full-service market research firms, and as the Research Director for Art & Science Group, Inc., a marketing consulting firm that predominantly serves higher-education clients. In addition, she worked as a Senior Research Analyst for Merrill Lynch, where many of her projects focused on assessing the impact of various advertising efforts.

Deirdre has significant experience conducting both quantitative and qualitative research, including moderating focus groups and conducting one-on-one interviews in a variety of industry areas including higher education, travel and tourism, financial services, and advertising and communications.

Deirdre is a graduate of Dickinson College, where she earned a Bachelor of Arts in psychology, Cum Laude. She has had advanced training in advertising research at the Burke Institute, focus group moderator training at the RIVA Training Institute, and is certified at the Expert level by the Marketing Research Association's (MRA) *Professional Researcher Certification* program.