

**REQUEST FOR PROPOSAL****Survey Software****1. INTRODUCTION**

The Health Quality Council of Alberta is a provincial agency that brings together patients, families, and our partners from across healthcare and academia to inspire improvement in patient safety, person-centred care, and health service quality. Through partnerships and collaboration, we are committed to achieving excellence in all dimensions of quality and safety across Alberta's health system (see [www.hqca.ca](http://www.hqca.ca)).

**1.1 Background**

As part of its mandate, the HQCA engages with Albertans on their experience and satisfaction with patient safety, person-centred care, and health service quality. The HQCA routinely conducts ongoing experience surveys in continuing care, primary care, and emergency departments in the province. In addition, the HQCA conducts ad hoc surveys in other sectors and populations. The HQCA collects input from a large number of Albertans, across many elements of the healthcare system. Historically this has resulted in approximately 50,000 to 75,000 responses per year, but as we expand our engagement activities, we expect this to increase. The HQCA is also exploring surveying in other areas of need in the healthcare platform, such as healthcare provider experiences and patient safety culture in various healthcare settings. Reports on patient experiences from the survey data are provided to healthcare stakeholders, including the survey participants, to help improve the healthcare Albertans receive. system

**1.2 Current Work**

The HQCA seeks a vendor to provide a robust surveying platform, that is feature-rich, while maintaining user friendliness. The platform will be used for the majority of the HQCA's electronic surveys of Albertans.

**2. SCOPE OF WORK**

The objective is to create a surveying platform that enables secure mixture-CAT surveying. Ideally this will be an end-to-end platform that enables the HQCA to send surveys directly to respondents. This will primarily be through email, but may include SMS text, QR code, or other electronic methods. The platform should administer surveys and generate reports for stakeholders in real-time.

**2.1 Project deliverables:**

- 2.1.1 The vendor will provide a surveying platform capable of meeting the HQCA's current and evolving future survey needs.
- 2.1.2 The platform will be able to send surveys to respondents, from contact information held by the HQCA, either through its own internal platform, or by interfacing with other software. For emailed surveys, ideally the platform will employ a web-based email platform that minimizes the impact of outgoing spam filters.
- 2.1.3 Any data from or relating to the surveys will be housed in Canada, in a secure format that meets the standards and privacy requirements of the HQCA. Preferably, the data will be housed on the HQCA's servers. Minimally the HQCA must be able to download original, raw data, and be capable of removing data from remote servers.
- 2.1.4 The platform should be capable of generating real-time reports to stakeholders and survey respondents or interfacing directly with other reporting software.
- 2.1.5 The vendor will provide ongoing support for the platform including software updates/upgrades as needed.

## 2.2 Time Frame

2.2.1 Implementation of the platform is expected to be April 1, 2024.

## 3. DETAILED REQUIREMENTS

### 3.1 Contacting respondents

The HQCA will upload contact information (typically email addresses, but potentially phone numbers, home addresses, or other contact information) and relevant demographic information.

3.1.1 The platform should be capable of accepting upload of contact information for in excess of 10,000 potential respondents at a time and send survey invitations to those individuals at a scheduled time or on-demand.

3.1.2 The platform should include an opt-out option, so individuals can have their information removed at their request.

3.1.3 The platform should be capable of maintaining a database of information for respondents that have been previously contacted, and the last date at which they were contacted.

3.1.3.1 The platform should be capable of locking out the ability to contact an email address if it has been contacted within a given timeframe.

3.1.4 The platform should be capable of sending survey invitations via SMS text message and generating QR codes to be scanned to access surveys.

3.2 The platform must support desktop and mobile versions of the surveys.

3.3 The HQCA requires the capacity to receive in excess of 100,000 completed surveys per year.

3.4 The HQCA requires a minimum of 10 user accounts, with the potential for future expansion.

3.4.1 A minimum of 2 user accounts must be administrator-level, with access to all projects and features. Remaining accounts require only access to specific projects.

3.5 Presentation of the surveys should be customizable by the HQCA, including but not limited to a wide colour palette; the ability to include logos; removal of vendor branding; survey close redirect and messaging options; a wide variety of question and response types (e.g., radio buttons, multi check, matrix grids, visual analog scales, in addition to open-ended text entry fields).

### 3.6 Data analysis capabilities

The platform must include data analytic capabilities that include, at a minimum:

3.6.1 Reporting of response distributions.

3.6.2 Data export to a variety of analytics tools.

3.6.3 Export of verbatim qualitative open-ended responses.

### 3.7 Optional Reporting Capability

If the platform provides reporting capabilities, rather than linking to an external reporting platform, the content, look, and interactivity of those reports will be determined in conjunction with the HQCA. Any visual, stylistic, or content-related choices must be approved by the HQCA, and ideally be customizable by the HQCA as needed. It should have a robust suite of customization options in graphic presentation styles, colours, fonts, and other display options.

#### 4. FEE PROPOSAL

- 4.1 The fee proposal shall include the total fees, including a detailed breakdown of professional fees for the project deliverables listed in 2.1, broken down by hours and hourly rates, and,
  - 4.1.1 Detailed costing for the additional information in section 3 by hours and hourly rates.
- 4.2 Also included should be an anticipated payment schedule with each fee item attached to a specific deliverable.
- 4.3 The vendor shall provide costs per user account, and incremental costs for additional accounts.
- 4.4 The vendor shall provide costs for up to 100,000 survey responses per year, in addition to incremental costs for additional responses beyond 100,000.
- 4.5 The vendor shall provide costs for ongoing maintenance of the platform, in addition to per-piece rates for changes and updates.

#### 5. PROPOSAL FORMAT

The proposal must provide the following detail about the project:

- 5.1 Understanding of the HQCA's needs
- 5.2 Proposed approach/methodology including a detailed description of the proposed solution, implementation, and associated activities
- 5.3 Number of individuals (approx.) that will work on the website project, their roles and responsibilities
- 5.4 Biographies, relevant experience and years of experience for each, their role
- 5.5 Proposed work plan
- 5.6 Overall timeline for completion of all deliverables for the project
- 5.7 List of tasks and associated hours
- 5.8 Hourly rate
- 5.9 Estimate of other costs and anticipated expenses
- 5.10 Total project cost
  - 5.10.1 Costs per user account, and incremental costs for additional accounts.
  - 5.10.2 Costs for up to 100,000 survey responses per year, in addition to incremental costs for additional responses beyond 100,000.
  - 5.10.3 Costs for ongoing maintenance of the platform, in addition to per-piece rates for changes and updates.
- 5.11 Vendor understanding of the HQCA and its surveying needs, including a detailed description of the proposed solution, implementation, and associated activities.
- 5.12 Vendor's relevant experience to include previous projects, personnel involved, what was achieved, and when these were completed.
  - 5.12.1 References – a list of three references of clients who can attest to the firm's ability to complete the required work.
- 5.13 Detailed fee proposal as noted above.

## 6. RESPONSE EVALUATION AND RESPONSE RULES

- 6.1 While the HQCA has made every considerable effort to ensure that accurate information is contained in this RFP, the information is supplied solely as a guideline.
- 6.2 All submissions shall be firm proposals and may not be withdrawn for a period of sixty (60) days following the last day to accept proposals. Proposals and documents submitted by the vendor will remain the property of the HQCA and will not be returned.
- 6.3 Acceptance/Rejection of Responses:
  - 6.3.1 The HQCA reserves the right to cancel this RFP at any time and to reissue it for any reason without incurring liability and with no vendor having any claim against the HQCA as a consequence.
  - 6.3.2 The HQCA reserves the right to reject any or all proposals; the lowest fee proposal will not necessarily be awarded a contract.
  - 6.3.3 All vendors submitting proposals will be advised of the contract award.
- 6.4 Evaluation

The HQCA will establish a selection committee that will evaluate all proposals that are submitted by the deadline.

Evaluation criteria will include:

  - 6.4.1 Vendor experience and capability
    - 6.4.1.1 Best practice/current thinking
    - 6.4.1.2 Ability to meet volume demands
  - 6.4.2 Team
    - 6.4.2.1 Overall experience of vendor team members
    - 6.4.2.2 Experience with organizations with similar needs to the HQCA
    - 6.4.2.3 Ability to meet HQCA deadlines and deliverables
  - 6.4.3 Survey software
    - 6.4.3.1 Overall ability for software to meet the HQCA's needs
    - 6.4.3.2 Understanding of the HQCA's needs
  - 6.4.4 Vendor privacy and security policies and ability to comply with Alberta privacy legislation.
  - 6.4.5 Fee Proposal
  - 6.4.6 References
- 6.5 Any and all addenda to this proposal call will be issued in writing and sent to all firms having received documents from the HQCA prior to the closing deadline.
- 6.6 The selected vendor will be required to sign and comply with an HQCA contract.
- 6.7 Closing of proposal:
  - 6.7.1 Firms may not submit new proposals after the specified deadline.
  - 6.7.2 Amendments to submitted proposals must be received in writing prior to the deadline date.
  - 6.7.3 All addenda issued during the time of the RFP, and in closing, the addenda will become part of the contract along with the vendor's response to the proposal.

## 6.8 Interviews

Vendors may be required to attend an interview to discuss their response to the Request for Proposal.

## 6.9 Deadline for Submission

Vendors are to deliver their responses **No later than February 16, 2024 at 5:00pm MST time** by email to: [Roland.Simon@hqca.ca](mailto:Roland.Simon@hqca.ca)

Note: It is the responsibility of the vendor to confirm receipt of emailed materials.

6.9.1 All proposals received after this time will be rejected. Each proposal shall show the full legal name and business address of the vendor, including its street address if it differs from the mailing address and shall be signed with the signature of the person/persons authorized to bind the vendor and shall be dated.

6.9.2 All costs/expenses will be the sole responsibility of the vendor submitting the proposal. Each response must be duly signed and sealed and will be deemed irrevocable for 60 days after the deadline date. Fax copies will not be accepted.

6.10 All proposals must be clearly marked "Request for Proposal: HQCA Survey Software".

6.11 Vendors must identify any terms and conditions of this Request for Proposal with which they are unable to comply. It will be assumed that the vendor accepts all terms and conditions unless otherwise noted and that all terms and conditions will form part of the contract.

## 7. CONFIDENTIALITY AND USE OF INFORMATION

7.1 All responses received are confidential and shall be treated as such. All documents submitted to the HQCA are subject to the protection and disclosure provisions of the Alberta *Freedom of Information and Protection of Privacy Act* (FOIPPA). While this Act allows a person a right of access to records in the HQCA's custody or control, it also prohibits the HQCA from disclosing the Vendor's personal or business information where disclosure would be harmful to the Vendor's business interests or would be an unreasonable invasion of the Vendor's personal privacy. Applicants are encouraged to identify what portions of their submissions are confidential and what harm could reasonably be expected from its disclosure.

7.2 The FOIPPA can be obtained through the Queen's Printer Bookstore found at <http://www.qp.alberta.ca/>.

7.3 The purpose for collection of the personal information required to be provided in the response is to enable the HQCA to ensure the accuracy and reliability of the quote. Any questions about the collection of your personal information should be directed to Charlene McBrien-Morrison, HQCA Chief Executive Officer at [charlene.morrison@hqca.ca](mailto:charlene.morrison@hqca.ca) or (403) 297-8274.

## 8. PROPOSED PROJECT TIMELINES

February 16, 2024	Deadline for submission
February 16-26, 2024	Selection of vendor
February 27, 2024	Successful vendor notified
February 27-March 1, 2024	Finalization of contract
April 1, 2024	Transition to vendor survey platform completed