



June 4, 2020

RE: ONSITE CLINIC CONSULTING FOR INDIAN RIVER COUNTY

Dear Indian River County,

Thank you for giving us the opportunity to partner with you to build a best-in-class program onsite clinic. We view this initiative as a several-phased process, as described below.

Phase I – Program Inventory and Assessment (2-4 months)

Population Health Claims Review

- ❖ Focus on populations at clinic locations
 - Preventive Care
 - Chronic Conditions
 - Gaps in Care
 - Risk Scores

Conduct Feasibility Study & Clinic Evaluation using Infolock®:

- ❖ Will complete a feasibility study, a high-level analysis of claims data to understand utilization trends and the prevalence of specific risk factors. The study also identifies potential savings related to cost diversion.

Phase Ib – Employee Focus Groups (1-2 months), Optional

- ❖ Lockton facilitated, employee focus groups to determine interest and cultural connection to having these services available.
- ❖ Pending timing can opt for virtual focus groups.

Phase II – Request for Proposal (RFP) and Process Management (3-4 months)

Establish Onsite Clinic Goals and Scope of Services:

- ❖ Establish program goals and scope for the Request for Proposal
- ❖ Confirmation of clinic design (e.g. hours of operation, location, build out needs, access, etc.)
- ❖ Confirmation of staffing models and clinical scope (e.g., episodic/acute care, preventive care, wellness health coaching, primary care, chronic condition management, occupational medicine, executive physicals, laboratory, pharmacy dispensing, etc.)
- ❖ Confirmation of access (e.g. who will have access to the clinic?)
- ❖ Confirmation of Indian River County's budget for the clinic
- ❖ Confirmation of clinic facility and potential build out

Request for Proposal:

We will include the strategic goals and scope of services as determined above. The RFP will address the following topics:

- ❖ Company background, philosophy, experiences and references
- ❖ Account management model and account team experiences/capabilities
- ❖ Staffing model and qualifications of staff (Medical Doctor, Physician Assistant, Nurse Practitioner, Nurse Assistant, etc.)

- ❖ Integration with current/future health and wellness programs
- ❖ Wellness program design and features: portal, health coaching, disease management, health webinars, nutrition and physical activity tracking tools, physical activity tracking devices, etc.
- ❖ Compliance considerations
- ❖ Technology requirements and capabilities
- ❖ Employee and employer reporting
- ❖ Fees/cost
- ❖ References
- ❖ Performance/service guarantees

RFP Evaluation and Recommendations:

- ❖ Evaluation of the RFP responses with a proposed pricing scenario
- ❖ Executive summary of recommended finalists
- ❖ Participation in and facilitation of 2-3 finalist meetings and/or site visits

Phase III – Implementation Oversight (2-3 months)

- ❖ Contract negotiations
 - Review standard contract language provided with RFP responses
 - Determine additional criteria to be met by the vendor such as:
 - Service and performance expectations
 - Reporting schedule
 - Data transfers
 - Additional fees for data transfers
 - HIPAA compliance
- ❖ Establish project meeting schedule with detailed agendas provided by selected vendor
- ❖ Ensure proper data integration protocols are established
- ❖ Ensure timeline matches the negotiated contract terms regarding quality and timeliness
- ❖ Confirmation of communication strategy
 - Partner with clinic vendor to strategize launch and ongoing communications

Phase IV – Evaluation & Infolock® Data Analysis (Ongoing)

- ❖ Infolock® data mapping of onsite clinic utilization
- ❖ Annual report review of onsite clinic assessment
- ❖ Evaluate and compare to key performance metrics identified. Some examples may include:
 - Utilization rate by member type
 - Utilization by visit types and diagnoses/conditions
 - Outreach and engagement levels related to lifestyle and disease coaching
 - Risk and compliance impact of those engaging in the clinic vs. non clinic users
- ❖ Recommendations for enhancements/modifications to clinic scope and services as new data becomes available

Lockton Team

Health Risk Solutions Consultant, Melissa Anchia, will be the engagement “lead” for this initiative. Melissa will work with Sue Cugno, Unit Manager, and Kristen Robles, Senior Account Manager, to work through

each phase of the project. We will work with Indian River County throughout providing updates and collaboration through each phase.

Lockton Fee

Our fee for this full engagement is \$75,000. Compensation can be structured in a manner that is convenient to Indian River County.

- Phase I: \$25,000
- Phase 1b: \$10,000, Optional
- Phase II: \$25,000
- Phase III: \$15,000
- Phase IV: Included in ongoing BOR scope of service

Thank you again for your consideration. We look forward to discussing this with you.

Sincerely,

Lockton Companies