



Date

Name

Director of Employee Occupational Health

Large Health System

Street

City, ST, 00000-0000

RE: Consulting Services

Dear Ms Name,

OEHN appreciates the opportunity to submit this proposal for providing Consulting Services to the employee/occupational health department of a Large Health System.

This proposal follows your discussion regarding program requirements with our consulting team on date. Please call me directly (000-000-0000) if there are clarifications or questions regarding this document. We again, thank you for the opportunity.

Regards,

Mr. COO

COO



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Proposal Submitted by:

Occupational and Environmental Health Network  
Marlborough, MA

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Proposal Submitted to:

Large Health System  
Consulting Services

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Version 1.0  
Date Published: Date

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Please be advised information in this document is confidential and proprietary and meant for the sole use of Large Health System and Occupational and Environmental Health Network (2010).



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## About OEHN

The Occupational and Environmental Health Network (OEHN) provides premier employee health solutions for corporate and hospital occupational health departments throughout New England. OEHN has become the recognized leader in this field by providing an expert body of knowledge to employers, insurers, employees and healthcare providers.

OEHN is supported by a team of Board Certified Occupational Health physicians, program management staff, project managers and consultants who excel in their field. Our network of hospital partners and local, regional and national network of occupational medicine resources provide corporate organizations, hospitals, disability management providers, educational institutions and the government with a comprehensive portfolio of occupational medicine solutions.

## Solution

OEHN has the vast knowledge, experience and expertise which Large Health System (LHS) is seeking. OEHN has a significant background in reviewing occupational health services of premier hospitals universities and leading edge corporations and providing expert future state recommendations. OEHN's confidential best practice engagements will be applied to support the project initiative with LHS. OEHN's integrated clinical and business approach will support LHS's future state business requirements.

## Large Health System - Requirements

OEHN has been asked to submit a proposal to review current occupational health services and provide future state recommendations for the LHS Occupational Health Program (OHP). This document follows initial discussions with core LHS stakeholders on December 21, 2009. At that time, OEHN qualified the preliminary requirements and needs as well as gaps across the LHS OHP. OEHN is recommending an accelerated clinical, operational and financial review of the current state environment of the LHS OHP. The results of this review will be used to formulate a comprehensive set of short and long-term strategic alternatives for LHS core stakeholders to consider. This plan aligns with an executive briefing with core stakeholders scheduled for DATE. OEHN's primary deliverable is to assess the viability of a best practice, internal Occupational Health Program for the LHS which will deliver a vision and optimal value for the short and long term needs of its internal customer segments.

## OEHN Approach

Based on LHS requirements, OEHN is proposing the following approach:

- Provide 8.0 days of on-site and off-site consulting services (Please see Service Delivery Cost Model section.)
- Conduct quantitative survey analysis, distributed to key stakeholders within the OHP (The survey will be provided prior to OEHN's on-site engagement)
- Perform qualitative interviews with key OHP stakeholders
- Develop scenario analysis which will provide alternatives around in-sourcing and out-sourcing the services currently provided by the LHS OHP
- Review clinical portfolio of services, organizational design/structure and staffing/competency
- Perform operational review, including financials, cost structure, service delivery model and Worker's Compensation
- Assess perceived value of OHP by internal customer segments in which it serves

- Evaluate current state occupational health management system and provide recommendations for new vendor system solution

## OEHN Consulting Methodology

OEHN will endeavor to execute a three week review of the LHS requirements and will deploy a three phased approach in executing this project. The three weeks are contingent upon availability of documents, availability and cooperation of individuals and management engagement.

- Time Phased Project Approach (two weeks) \*

### Phase 1: Structure

1. Kick-off meeting with key LHS project leads:
  - ◆ Establish expectations, priorities and roles
  - ◆ Agree on core requirements
  - ◆ Identify a LHS based Project Leader
2. Validate Scope of Work/Statement of Work (SOW)
3. Deliver OEHN Master Plan: Roles, activities, methodologies, owners and action dates

### Phase 2: Configure

1. Review all core requirements:
  - ◆ Conduct qualitative personnel interviews
  - ◆ OEHN will require access to LHS's financial data, current staffing model, service delivery statistics and all other pertinent documentation relevant to this project
2. Complete Current State Gap Analysis across core requirements

### Phase 3: Propose Future State Plan/Strategy

1. Propose future state recommendations
2. Recommend future state organizational staffing structure
3. Propose future state in-sourcing/out-sourcing strategies

- Review critical success requirements:
  - Service Level Agreement and/or memo of understanding
  - Scheduled executive briefings to evaluate the effectiveness of the review

- Access to key stakeholders across the LHS
- Senior management collaborative support and buy-in

## **Project Management - Communication**

It is proposed that OEHN works in cooperation with a LHS Project Manager to drive the core planning components of this engagement and communicate the status of the core planning initiatives and deliverables to current staff and senior management. This designated resource will work directly with the OEHN Project Leader.

## **OEHN Requirements**

OEHN will require appropriate resources during this engagement, including: office area for confidential meetings, access to LHS (security badges), support of this program by senior management, including a description and promotion of OEHN's role and responsibility to all LHS OHP staff during this engagement as well as the positioning of support and commitment by LHS senior management.

## **Master Plan**

OEHN will be responsible for delivering a Master Plan at the commencement of this engagement. This plan will document the key engagement initiatives, required resources, project outcomes, and target date of completion. It is proposed that this plan be signed off by LHS responsible parties prior to moving forward with the engagement. This plan will be the key communication map detailing OEHN's core initiatives and deliverables. OEHN proposes that status meetings occur on a weekly basis during the course of this engagement.

## **Agreement**

OEHN proposes a written Contract follow the LHS approval of this proposal.

## Service Delivery Cost Model

Service Activity 1: Structure	Fee
OEHN to review current state, gaps and conduct quantitative/qualitative review across LHS OHP.	
Service Activity 2: Configure	Fee
OEHN to present current state review of all core initiatives. Please refer OEHN Approach section of this document.	
Service Activity 3: Future State Recommendations	Fee
OEHN to present future state recommendations on short and long term LHS OHP department strategy.	



## Consultant Profiles

Major resources that will be provided to LHS are shown below. A complete CV or resume will be provided upon request.

### Mr. COO, MBA

#### COO OEHN, Project Leader

Mr. COO is Occupational & Environment Health Network (OEHN) Chief Operating Officer. He has over twenty years experience within the operations, sales and marketing functions. Joe has conducted employee/occupational health department reviews in numerous hospital settings over the last five years.

As Chief Operations Officer, Mr. LastName is currently responsible for overall business operations for OEHN situated in Marlborough, MA.

Mr. LastName is a former Vice President at Corporation within their Investment Management Outsourcing market. He has managed and directed regional, national and international sales teams for companies such as AT&T. He has a strong track record in organizational consulting, including: strategic planning, operations review, service delivery model, business model and organizational structure and design. Joe is a national speaker and has written many papers on occupational health topics.

Joe has presented at the national ACOEM conference and numerous regional lectures on Health and Productivity Management. Joe is also an Adjunct Professor. He has taught at the college level within the marketing, management and human resources curricula areas. Joe has an MBA and Advanced Management Certificate from Boston University.

### Name2

#### Senior Consultant

Name2 has been providing financial and operations consulting to OEHN and other companies since March 2008. Prior to his role with OEHN, Mr. Name2 was the Chief Financial Officer of ViryaNet Limited, a publicly traded software company based in Southborough, Massachusetts. He has a significant track record in leading and managing private and public companies in the areas of operations and finance. Mr. Name2 has provided consulting for some of OEHN's largest hospital based clients.

He is a former chief financial officer of Ziplink Inc., a provider of wholesale internet connectivity services and has also served as vice president, finance, Enterprise Data Products Group for Nortel Networks, a global telecommunication networking company. Mr. Name2 was employed at Digital Equipment Corporation in a variety of finance and finance management roles, supporting the professional services, data networking, and systems integration businesses.

Mr. Name2 received his Bachelor of Science degree in Economics and Finance from Bentley College.

### Anne Name3, NP-C, MSN

#### Senior Consultant

Anne Name3, NP-C, MSN is a graduate of Simmons College Adult Nurse Practitioner and Master in Nursing Program with an Occupational Health concentration. As a provider of occupational healthcare and expertise, Ms Name3 brings hands-on experience and new solutions to the arenas in which she serves. Her current OEHN consulting role

includes assisting Covidien, Inc. to standardize healthcare services through guideline development, education, and the introduction of a travel medicine program.

Having left her imprint at Fortune 500 companies, such as Polaroid, Bayer, and Raytheon, she imbues solutions with knowledge of policy formation, medical protocol definition, electronic medical record implementation and medical surveillance programming acumen. At Polaroid, Ms Name3 was instrumental in introducing smoking policy initiatives and corporate-wide wellness programs. At Bayer, Ms Name3 began a four year workstation evaluation process, an educational program and team development that led to a marked reduction in repetitive trauma injuries and lost time. The lost work day tally decreased from over 400 lost work days in one year to 4 lost work days just four years later. At Raytheon, Ms Name3 program managed the implementation of an electronic medical record system in 26 domestic health centers, while managing expatriate medical evacuations, leading a medical surveillance corporate team and coordinating an enterprise AED program. A talent for bringing diverse voices and needs together and solving a common issue is a trait that permeates her work, as is a common sense approach. Ms. Name3 is a member of the American Association of Occupational Health Nurses.

## **Tanya Name4**

### **Project Coordinator**

Tanya Name4 has been with Occupational and Environmental Health Network (OEHN) located in Marlborough, MA since 2006. She works collaboratively with OEHN Senior Management and Program Managers in Employee Health across New England to deliver Client Relations and Account Management initiatives. Tanya is a graduate of Babson College and recently earned her designation as SPHR (Senior Professional Human Resources).

## **Valerie Pederson**

### **Documentation Specialist**

Valerie Pederson has been with OEHN since 2004. She has worked collaboratively with OEHN writing, editing, and managing their documentation. Valerie has over 20 years of business writing experience at companies in the high tech and medical industries. She is the author of two books. Valerie is a graduate of UMass, Dartmouth, holds a Graduate Certificate in Technical Writing from Clark University, and has attended a number of other additional business, writing and computer courses.

Valerie Pederson will provide Project Management expertise and work in collaboration with the OEHN project team, and as needed LHS key stakeholders to effectively manage the core components of this project. Valerie Pederson will ensure that all documents submitted by OEHN will be clear, readable and concise.

## Appendix A. Memo of Understanding and Confidentiality Agreement

It is the option of LHS to sign a memo of understanding for both parties prior to this engagement.



## Appendix B. Tax Payer ID and a Massachusetts Company

OCCUPATIONAL & ENVIRONMENTAL HEALTH NETWORK, INC. (“OEHN”) is a Massachusetts professional corporation, located at 5 Mount Royal Avenue, Marlborough, MA 01752 and was established in October 2004.

Taxpayer ID: 00-0000000

## Appendix C. References

Available upon request.