

Guidebook for the Oklahoma Emergency Response System Stabilization and Improvement
Revolving Fund (OERSSIRF) - Fiscal Year 2017

This guidebook is an attempt to provide any interested party the information relevant to the OERSSIRF program. While the document is detailed, it is not meant to limit any submission or proposal that will “Stabilize and Improve” EMS in Oklahoma.

Any potential conflicts between the information in the Guidebook and the application sections are unintentional. If conflicts exist, follow the application instructions.

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Introduction

What is the Oklahoma Emergency Response System Stabilization and Improvement Revolving Fund, or OERSSIRF?

OERSSIRF was created through statute for the purposes of:

1. Funding Assessment Activities,
2. Stabilization and/or reorganization of at-risk emergency medical services,
3. Development of regional emergency medical services,
4. Training for emergency medical directors,
5. Access to training frontline emergency medical services personnel,
6. Capital and equipment needs.

The following individuals or organizations can apply for these funds?

Any person or organization or any combination of:

1. licensed, certified or approved by the Department as part of the EMS system, such as EMS personnel, certified emergency medical response agencies, licensed ambulance services,
2. approved training institutions,
3. approved emergency medical dispatch agencies, approved medical directors
4. or their associations or sponsoring organizations, such as EMS districts, cities or counties that operate certified emergency response agencies or licensed ambulance services,
5. or education systems operating EMS training institutions.

How are the funds awarded, earned, or won?

- This is a competitive scoring process. The Department must release it through a "Request for Proposal" (RFP) process because of the scoring process.
- Each response is a submission to the Department to enter into a contract with the Department.
- After the scoring process, the "Contracts" are awarded to the entities that scored higher in the ranking of scores.
- These are contracts, and the expectation is that the vendor will complete the terms in the contract.
- Invoices will then be submitted from the Vendors to the Department periodically, so that reimbursement can be made.

Application and process changes for FY 2017

Changes to the application and the process are identified throughout the document. The changes are highlighted in **YELLOW**.

A summary of the changes are:

1. The Guidebook has been updated. .
2. Number of EMT's is based on zip codes. The report is dated April 20, 2016.

OERSSIRF Key Terms

Application means the section of the solicitation that is used for scoring purposes.

At risk is not defined within the regulation, but is part of the scoring process. If the applicant asserts they are at risk, then adequate documentation is required for the reviewer to be able to award points for at risk categories

Benchmark refers to the measurement of success from the proposal. The agency defines how success will be measured, and the Department will review the grant activities to determine what benchmark should be awarded.

Deliverables means these are the items within the proposals that the qualified entity states will be accomplished if awarded. Each deliverable will need a way of measuring success

Department means The Oklahoma State Department of Health

Matching Funds means encumbered or assigned funds that are dedicated to the completion of the proposal. For OERSSIRF, there are two types of matching funds: 1) funds encumbered to the project and 2) donated labor, time, material, or donated money dedicated to the completion of the project

OERSSIRF Regulations mean Oklahoma Administrative Code 310:642

OERSSIRF Statute means O.S. Title 63 § 1-2512.1

Request for Proposals also known as the RFP means the process by which the Department is able to solicit vendors to provide goods or services to the Department.

Response to the RFP means documents received as a response to the RFP. The initial documents are reviewed for essential criteria. If the initial response is complete, then the completed proposals are then sent to the panel for review.

Reviewers' means the panel of volunteers that will be used to review the proposals submitted to the Department. There are nine reviewers on the panel.

Solicitation means the request for the RFP

“The applicant asserts- the reviewer validates”- is a statement used during the review process. Each application is an assertion or statement that the applicant has earned the points declared within the proposal. Reviewers will score the applications based on the contents, and their understanding of the contents. The contents of the response must support the assertions. If the contents do not support the assertions, then the individual reviewers cannot validate the assertions.

Vendors means the qualified entity that is awarded a contract

Considerations and tips regarding how to respond to the solicitation

- Read the guidebook
- Read all directions for the solicitation and application
- Please read the attachments
- Prepare a list of documents you will need to send.
- Ensure you know who will need to sign the solicitation
- Consider what you need that will “Stabilize and Improve” Emergency Medical System in your community, or region.
- **When you are listing and detailing your needs, determine how you will measure success.**
- Use the application fields to answer questions and provide narratives
- Always remember, as a response to the RFP, you are asserting how you will “Stabilize and Improve” EMS in your area and Oklahoma. Use the fields next to the point values to not only serve as a check list and a way to show the reviewers what you are asserting. After reading the assertions, the review panel will validate your assertions and provide a score.
- Do not assume the reviewers will understand what you are submitting. The narrative of the proposal is as important as the documents provided. The narrative will explain what you will use the money for, and explain the supporting documents. The supporting documents are used to validate the assertions made in the application and narrative.
- **If the applicant is working with another agency or entity to complete a deliverable, (e.g. as an agency working with a dispatch center for improvement), be sure to include letters of support or commitment from your “partners”. This deliverable will also need to be detailed in the benchmarks.**
- Nine (9) copies and the original are required to be submitted. An application will not be sent forward for review if the original and nine copies are not submitted.

Process

A “RFP” is released because the Department is “Soliciting” responses and proposals from “Qualified Entities” to “Stabilize and Improve” the Emergency Medical Services within the State of Oklahoma.

The “Response” from a “Qualified Entity” to the “Solicitation” contains what will be done to “Stabilize and Improve” EMS in Oklahoma.

Prior to the RFP closing date, a pre-proposal conference will be held to provide an open forum to provide information to potential applicants.

In this conference, questions may not be answered, but they will be collected for the purposes of responding in accordance with State of Oklahoma Procurement Statutes and Regulations.

The application process is:

1. Responses are received in Procurement before the RFP closes
2. The response must include nine (9) copies and the original
3. Documents are reviewed for Procurement Criteria
4. Documents are reviewed for Emergency Systems Criteria
5. Documents that do not have Procurement or Emergency Systems Criteria are not sent to the review panel
6. Documents that contain all required criteria are proposals that are submitted to the panel for review and scoring
7. Each scored proposal is then ranked and awards are based on rankings

What does this mean?

Before a response will be considered for review, the Department will evaluate each submittal to determine if it includes the following:

- A. Is the response from a legal and qualified entity?
- B. Does the response contain the required signatures for the solicitation?
- C. Does the response include appropriate statutory purposes?
- D. Does the response include complete responses for Local need, support, and Priority with Statewide needs and public interest
- E. Does the response include complete responses regarding the availability of other funding or other assistance
- F. Does the response include complete responses regarding economic and project feasibility?
- G. Does the response include a section setting the criteria that will be used to evaluate the project?
- H. Does the criterion include specific, objective (measurable) metrics (numbers or data)?
- I. Does the criterion include a clear methodology and a description of the data sources used to compute or determine the performance measures within the project?
- J. Are Significantly Improved, Improved, Not Improved, and Worsened, measurements included in the criteria?

If the answer is no to any single section, then the response will not be sent to the review panel, based on the following regulations:

O.A.C. 310:642-3-1-(b)

Criteria applicability

(1) The criteria set forth in subsections (c) and (d) of this Section shall constitute guidelines and standards for proposal review and consideration by the Department.

(2) The criteria and standards set forth in subsections (c) and (d) of this Section shall be applied to each proposal without exception.

O.A.C 310:642-7-1 Content of proposal

(b) Each proposal shall include a section setting forth the criteria that will be used to evaluate the success of the project. The criteria shall include:

(1) Specific, objective metrics for evaluation of the project. For example: a percentage decline in response time or improvement in the number of available EMTs within a region, measured against the same metric at the start of the project.

(2) A clear methodology and a description of data sources for computing the performance measures proposed in the project plan, for example, comparing responder response times or the total number of EMTs in a region against the same metric at the end of the project.

(3) Benchmark measures for each of the following assessment levels:

(A) Significantly improved.

(B) Improved.

(C) Not Improved.

(D) Worsened.

OERSSIRF Sections (Attachments A and B)

General Directions:

Each section asks for specific information. The information is provided in the narrative space, and supported by any required documentation. In the sections that have awardable points, the applicant is asked to complete the self-score section. These self-scores assists the reviewers to look for specific information in the narrative and documents. It also serves as a type of checklist for the person completing the application. More specific directions are below.

Part 1: Solicitation Package (Part B)

The Solicitation Package is part of the finished contract and must be submitted with the OERSSIRF Application. There are three parts that are required. They are the OMES Solicitation, the Solicitation Request, and the Special Provisions.

The OMES Solicitation

- Page 1: gives submission deadlines, details and the topic of the RFP
- Page 2: must be completed by the person authorized to obligate the Supplier to a contract (The person who can make business decisions and enter into contracts for the applicant is the person that needs to sign this document)
- Page 3: must be completed by the person authorized to obligate the Supplier to a contract (The person who can make business decisions and enter into contracts for the applicant is the person that needs to sign this document)
- Page 4- 8- General terms and Conditions- A must read. (This describes the business arrangements between the vendor and the State)

Special Provisions

- Page 1 to 8 Special Provisions, Solicitation Instructions, Terms of the Contract- A must read. (This describes specific requirements the applicant must complete to submit a complete response)

Solicitation Request- Document providing the authority for the Department to solicit RFPs.

Amendments to the Solicitation Package

When amendments to the Solicitation Package are required, the amendments will be released on the website. It is up to the Supplier to check the website throughout the open bidding period for any amendments to add to their proposal. The Amendments are required to be submitted as well.

Part 2- OERSSIRF Application (Attachment A)

Section 1: Project Proposal Information, Inclusions, and Requirements

Submitting Agency, Entity, or Individual is asking for the Name of the Qualified Entity submitting the response.

Mailing Address is the address of the qualified entity that correspondence from the office can be mailed to.

Business Telephone is the telephone number to contact the qualified entity submitting the response.

Project Contact Name is the name of the person representatives from the Department can contact when discussing the response.

Telephone Number is the phone number of the contact person

Email Address is the email address of the contact person

Project # is needed if the entity is submitting more than one proposal. Please number them as project 1, project 2, etc.

Total cost of project is how much money will be spent IN TOTAL to complete all the deliverables within the submission. This is the amount of money requested from OERSSIRF and matching funds the entity contributes.

Requested OERSSIRF Amount is how much money is needed from OERSSIRF to complete all the deliverables. This is the amount of money to accomplish the deliverables minus any matching funds.

Person completing application is the person that completes the application.

Signature is from the person that has the responsibility to ensure the deliverables is completed.

Date signed is when the signature was affixed to the response.

Statement:

Each application is a single response to a Solicitation for Request for Proposals released for FY 2017. A single response cannot be considered as part of a larger project area or goal unless there are documents within the proposal that establishes the multi-jurisdictional support.

Also, any partnerships that occur between different organizations, such as a Private Ambulance Service and a City Police Department will need to have agreement letters showing the goal.

This type of partnership may not qualify as multi-jurisdictional. However, letters detailing this partnership would show an example of community support.

What does this mean?

- The RFP's that are funded are a contract with the Department.
- These qualified entities are asking to become vendors with the State of Oklahoma to provide "Stabilization and Improvement" activities for the State of Oklahoma.
- The stated goals, purpose, and deliverables within each proposal are the vendors responsibility to complete.
- If qualified entities are working together to accomplish a single goal, then documentation from the different jurisdictions or qualified entities must be included with the response.

Statutory Eligibility

The Applicant must possess all necessary and incidental legal rights and privileges for project commencement and completion. The application must reflect the eligibility of the applicant as well as the statutory purpose(s) of the project. The statutory requirements must be documented in Section 2 of the application. Proposals that do not meet statutory requirements will be returned to the applicant.

What does this mean?

- The applicant must be a qualified entity.
- The applicant is only able to request funds to accomplish one or more of the six statutory purposes for OERSSIRF Funding
- If an applicant requests funding for a purpose that is not included in the six statutory purposes, then the entire proposal will be rejected and returned to the applicant.

Local need, support, and priority with statewide needs and public interest

- (a) The applicant must show the project is needed and sufficient to meet the needs in the area.
- (b) The application must show how the proposed project will serve the public interest and welfare by demonstrating the relationship between the project and the overall EMS development needs within the State of Oklahoma, as identified in a needs assessment.
- (c) Needs assessments may include reports from Bishop and Associates, National Highway Transportation and Safety Administration, OSU Cooperative Extension Service, or other reports regarding EMS.
- (d) The application must show local support for, interest in, and commitment to the proposed project. Letters expressing support from legal entities such as cities, counties, and companies in the area to be served shall be included as appropriate. The application will be reviewed prior to scoring to ensure guidance was followed.
- (e) Attestations of the benefits of the project to the public interest and welfare shall be provided by an appropriately credentialed consultant or other expert. Credentials of financial consultant(s) and expert(s) shall be submitted with the attestation(s). Applicant shall not be considered an expert or financial consultant for the purpose of attesting to project need. The application will be reviewed prior to scoring to ensure guidance was followed.

What does this mean?

- How did you determine what you needed?
- Detail the document(s) used to determine what you needed.
- Describe how the requested items will meet your needs and “Stabilize and Improve” EMS in Oklahoma.
- Does the applicant have support from the community (ies) that will potentially benefit from the funds?

Availability of other funding

The applicant must demonstrate due diligence was performed to ensure no alternative funding sources could be obtained and utilized for financing the project. All measures and efforts by the applicant to find alternative sources of funding must be documented in the application. Efforts to determine alternative revenue must be documented in a narrative summary. Identify all measures and efforts to seek alternative funding sources. This may include attempts to seek tax dollars, (property or sales), changes in billing practices, or other activities designed to secure funding. The application will be reviewed prior to scoring to ensure guidance was followed.

What does this mean?

- Has the applicant sought other funding methods?
- Has the applicant detailed why other funding methods were not successful or effective?
- Why is this funding the only way to “Stabilize and Improve” your EMS agency?

Project Feasibility

The application must demonstrate the project is feasible and cost-effective. The project description shall establish all items to be purchased for the project are readily available on the open market and identified in Section 7. Spreadsheets must be provided that demonstrate purchasing timetables and costs for all project items. Appropriately credentialed consultant or other expert attestations to the feasibility and cost-effectiveness of the project shall be provided. Credentials of financial consultant(s) and expert(s) shall be submitted with attestations. Applicants shall not be considered an expert or financial consultant for the purpose of attesting to project feasibility and cost-effectiveness. The application will be reviewed prior to scoring to ensure guidance was followed.

What does this mean?

- How will the deliverables meet the needs in the assessment?
- Will this be a cost-effective way of meeting these needs?
- The consultant or other person providing the expert attestations must include their credentials that entitle them to make these statements?
- The applicant cannot attest to their own feasibility and effectiveness?

Agency/Entity Demographics

You are asked **BUT NOT REQUIRED** to provide the following information. The information can help members of the review panel gain a better understanding of your agency or entity. A score is not assigned to any of the submitted information. If an item does not apply to your agency or entity, you may submit an NA.

1. Level of licensure or certification: (EMR, BLS, ILS, or PLS)
2. How many agencies licenses or certification are owned and operated by the applicant submitted this proposal
3. Total number of responses for CY 2014
4. How is your agency/entity funded: charges, sales tax, property tax, utility assessment, donations, etc.?
5. Latest annual operating budget for the licensed or certified agency/entity
6. Number of permitted ambulances owned and operated by the applicant
7. Number and type of employees:
 - Full Time – or greater than 40 hours per week
 - Part Time- or less than 40 hours per week
 - Volunteers- (paid less than minimum wage for duties performed)
 - Total number of Emergency Medical Responders,
 - Total number of Emergency Medical Technicians
 - Total number of Intermediates,
 - Total number of Paramedics

What does this mean?

- You are not required to respond to these questions
- These may be helpful to the reviewers to understand the operations, advantages, and disadvantages of your service area
- These will not be scored, and cannot be part of the final score
- These questions are for information only
- NA, or not applicable is a valid answer

Applications containing more than 55 pages will not be reviewed, and will be returned to the applicant.

The 55 page limit includes application pages 1-15 and the documents that support the application, contents, attestations, assertions, descriptions, and purpose. Documents that support the timeline, benchmarks, and documents required to establish project legal and contractual requirements are not included in the 55 page limit.

What does this mean?

- Count your pages
- The pages that do count include pages 1-15 and their supporting documents
- The pages the state requires for the contract do not count against the 55 pages
- Timeline and benchmark documents do not count against the 55 page limit
- Documents that establish your legal and statutory eligibility do not count against the 55 page limit
- Use the fillable spaces and blank pages to provide your narrative to make your assertions.
- Consider combining or limiting who you obtain your support letters from, focusing on the one that will meet the requirements for the response.

Section 2

These next sections are asking

1. Who or what is responding to the RFP and

2. Why is the response being submitted?

Narrative spaces are available to respond to these questions.

Qualified Entity and Statutory Purpose

What does this mean?

- EMS Personnel- an individual with a license or certification may apply for funding
- Certified EMRA- must have a certification from the Department
- Licensed Ambulance Service- must have a license from the Department
- Approved Training Institution must have approved through the Department
- Approved Emergency Medical Dispatch agencies are any organizations that provide EMD to areas in Oklahoma
- Approved Medical Directors are any medical directors affiliated with Oklahoma agencies
- Associations or sponsoring organizations include:
 - State Associations relating to EMS
 - EMS Districts, such as regional or funding districts
 - Cities or Counties that own operate and provide emergency medical response and transportation
 - Educational systems operating EMS training institutions

Statutory Purpose

What does this mean? What can the money to be used for?

- Funding assessment activities-
 - Does the qualified entity need to use a consultant to evaluate the existing system?
 - Does the entity need funds to professionally assess and determine the best solutions for the area?
 - Will the entity pay for and receive an assessment to determine their needs?
- Stabilization and/or reorganization of at-risk emergency medical services-
 - How is your entity at risk?
 - What is the entity at risk from?
 - Does the entity need funds to restart a failing service?
 - Does the entity seek to implement solutions identified an assessment?
 - Does the entity need money to remain open?
- Development of Regional Emergency Medical Services?
 - Will the money be used to create a system of different agencies, entities, communities or other partners to create a system that addresses a larger or expanded area?
 - Will the money be used to include different agencies and entities into an existing system, expanding services in an area?
- Training for Medical Director
 - Does the medical director seek formal training to become a better or more effective medical director?
- Access to training for front line emergency medical services personnel
 - Will the money provide training be used to either initial training for new personnel?

Will the money provide training be used to increase the level of licensure for existing personnel?

Will the money provide training be used to improve current skills within current licensure?

Will the money provide training assist the entity in maintaining current licensure?

- Capital and equipment needs

Will the funding be used to purchase equipment that needs to be replaced?

Will the funding be used to upgrade existing equipment?

Will the funding be used to buy supplies to support equipment purchases?

Application considerations:

If an applicant is seeking points for a statutory purpose, a deliverable and benchmark needs to be associated with the statutory purpose.

If the applicant “asserts” that an application will be used for several statutory purposes, the persons on the review panel will “validate” the contents of the application to award a score.

Section 3 Population Density and Multiple Jurisdictions

The population density of the proposed project area shall be determined by the **zip codes** within the proposed project area. This link is to a document that shows the square miles and population for each zip code in Oklahoma

http://www.ok.gov/health/Protective_Health/Emergency_Systems/EMS_Division/OERSSIRF_-_Oklahoma_Emergency_Response_Systems_Stabilization_and_Improvement_Revolving_Fund/index.html

The source document for this information is the U.S. Census Bureau. The link for the source document is: <http://www.census.gov/geo/maps-data/data/gazetteer2014.html>

To determine the population density for this project, identify all zip codes and their population in the proposed project area and enter the information below. The score for this part of the application shall be that associated with the zip code in the proposed project area with the **lowest population density**.

If this application is proposing a state-wide project, the population density will be 54.7 persons per square mile, which is the state-wide average.

Multiple Jurisdictions

If more than one community, county or other jurisdiction will benefit from this project, attach a map that highlights each such jurisdiction. Provide a list of the jurisdictions and describe the benefit to each one. For every listed jurisdiction, include documents that verify their inclusion in; and support for, the project.

What does this mean?

- In previous solicitations, the Department was only able to determine population based on county density. This year, we have been able to create a table that takes the population

is a zip code and the size of each zip code to create the population density for that zip code. (Formula- population /square miles = population density)

- There are hundreds of zip codes in Oklahoma. The table is in numeric order
- Include all the zip codes that will be included in your proposal.
- Reviewers will be able to access the table as well to verify your assertions.
- Zip codes listed will also be used to verify the assertions of multiple jurisdictions
- The multiple jurisdiction assertion may be supported by the following types of documents:
 - A. A map
 - B. A description in the narrative detailing how the different jurisdictions will benefit from the proposals.
 - C. Letters of support from the City or Town leadership. This may include any obligations they will incur for the success of the proposal.
 - D. County Commissioners. This may include any obligations they will incur for the success of the proposal.
 - E. Response agencies that rely and will benefit from the proposal. This may include any obligations they will incur for the success of the proposal.

Section 4 Number of EMTs in Project Area

The number of EMT's in the project area shall be the sum total of EMTs in the zip codes within the proposed project area. This link (document) is a report created April 20, 2016 showing the number of EMT's in each zip code in Oklahoma.

<https://www.ok.gov/health2/documents/Copy%20of%20number%20of%20EMS%20individual%20by%20zip%20code.pdf>

What this means?

- Using information provided by the Department- add the number of EMT's that are licensed within the proposal area
- The zip codes in this section should match the zip codes listed in other sections

Section 5 Distance to a Level I or II trauma center

A Level I Trauma Center is located in Oklahoma City. Two Level II Trauma Centers are located in Tulsa. The addresses for the trauma centers are: 1) OU Medical Center, 700 NE 13th Street, Oklahoma City, OK 2) St John Medical Center, 1923 South Utica Ave, Tulsa, OK 74104, and 3) St Francis Hospital, 6161 South Yale, Tulsa, OK 74136.

Determine the physical address in the project area that is most distant from the nearest trauma center. On the MapQuest site (<http://classic.mapquest.com/maps>) enter that physical address as the "START" and the address of the nearest Level 1 or Level II trauma center as the "END", then click "GET DIRECTIONS". Enter the mileage from "START" to "END" on the OERSSIRF application. Print the MapQuest map and include it in this application.

What this means?

- What is the closest trauma center to your proposal area?
- In your proposed area, what is the farthest point from the trauma center with an address?

- Use that address and the address of the closest trauma center to determine the distance from the trauma center?
- This copy of the directions, map, or other verification of the distance will need to be included.

Section 6 Proposed Expenditures

Describe all goods and services to be purchased with the requested funding. Assign a separate item number to each one. Enter the statutory purpose of each item; the estimated receive date of the item, and the associated benchmark number. Attach copies of any bids received and label the bid with the corresponding item number. Ensure total cost does not exceed funds requested in the proposal. See the example on the form.

What does this mean?

- This is a summary of what you will purchase through OERSSIRF funds.
- It is also a type of checklist to make sure that you include all the plans from the narrative are on this form.

Section 7 OERSSIRF Funding and Percentage of Encumbered Matching Funds

The applicant requested amount is the amount requested from the OERSSIRF fund. Please calculate the total cost of the project, and then subtract any encumbered matching funds. The difference should equal the amount of funds requested.

What this means?

- Is the applicant putting any matching funds into the project completion? If yes, determine the value of the matching funds. (See the guidance regarding matching fund percentages below).
- Establish the budget for the proposal
- How much money will the entire project require?
- What is the value of the matching funds?
- Project Budget – Matching Funds = How much money does the applicant needs from the OERSSIRF fund to complete the entire project?

Percentage of Encumbered Matching Funds

The encumbered matching funds percentage shall be calculated as follows: Total encumbered matching funds divided by total requested OERSSIRF funds = % of the project funding that depends on matching funds. Proposals that depend on encumbered matching funds shall include documentation (on letterhead, if possible) that clearly shows 1) a commitment to provide the matching funds, 2) who is providing the funds, 3) the amount to be provided, and 4) the purpose(s) to which the funds are committed.

The only matching funds that may be counted for points are: 1) funds set aside (encumbered) to accomplish the goals and benchmarks of the project; and 2) donated labor, time, material, and/or money dedicated to completion of the project. Attach all documents associated with matching funds to the application.

What this means:

- Matching funds are dedicated to the project objective
- Matching funds can be money dedicated from a budget (encumbered) or donated to be used for the project.
- Examples of donated matching funds include-
 - a- land donated for a building- the value of the land is the value of the donation to the matching fund percentage;
 - b- Labor - a contractor is willing to donate 20% of the cost of labor from the cost of the building. The amount of money that 20% equals is the value of the matching fund; or
 - c- material donated from a supplier could also be used in the matching fund percentage
- Clear documentation is required showing the type of matching fund being included and the source
- The formula to determine the percentage of matching funds is: $\text{Matching fund total} / \text{total requested OERSSIRF Funds} = \text{percentage of project matching funds.}$

Section 8 Previous Awards/Previous Benchmark Evaluations

If a qualified applicant has been approved for one or more OERSSIRF grants in the past, points shall be deducted; unless the previous proposal(s) was for an assessment of the need to establish an EMS agency or the stabilization of an at-risk EMS.

Within the definitions of the regulation- at risk is not defined.

As part of the scoring process beginning in 2012, if five reviewers awarded points for an agency being at risk, then points for the previous proposal will not be deducted. Otherwise, points for previous awards will be deducted.

What does this mean?

- If you have never been awarded OERSSIRF funding- this section does not apply to you
- If you have been OERSSIRF funding in the past, review previous awards and benchmark letters to determine the best score for your proposal.

Section 9 Benchmarks and Timelines for Benchmarks and Evaluations

As part of each proposal, the qualified entity is to include how success will be measured for the proposal.

The regulation states:

Regulation Reference: O.A.C. 310:642-7-1-(b)

(b) Each proposal shall include a section setting forth the criteria that will be used to evaluate the success of the project. The criteria shall include:

(1) Specific, objective metrics for evaluation of the project. For example: a percentage decline in response time or improvement in the number of available EMTs within a region, measured against the same metric at the start of the project.

(2) A clear methodology and a description of data sources for computing the performance measures proposed in the project plan, for example, comparing responder response times or the total number of EMTs in a region against the same metric at the end of the project.

(3) Benchmark measures for each of the following assessment levels:

(A) Significantly improved.

(B) Improved.

- (C) *Not Improved.*
- (D) *Worsened.*

What does this mean?

- Benchmarks are required.
- Benchmarks will include a specific and measurable outcome and a description of how the outcome was measured to determine the level of improvement.
- Levels of improvement include Significantly Improved, Improved, Not Improved, and Worsened.

Questions and considerations:

- What do I need to stabilize and improve EMS?
- How did you determine what was needed?
- Why do I need this item or items?
- How are you going to measure success- for the significantly improved, improved, not improved and worsened levels?
- What information are you going to compare and use to show the goals were met- and the deliverables stabilized and improved the system?
- The process or the summary regarding why the deliverable is needed will need to include your current status.
- The process and methods to determine our status can be documented in the application.

Step one:

Determine your needs to “stabilize and improve” EMS within the application.

How did you determine your needs? Did you:

- Review agency records?
- Work with staff to identify needs?
- What “numbers” determined your needs?
- If awarded, we will see these numbers change and improve.

These are your specific objective metrics.

Example:

The current status is X, and Y is needed to stabilize and improve our current status.
The amount of change between X and Y determines your success level.

Also, X and Y will need a time frame reference. (Between MM/DD/YYYY and MM/DD/YYYY - This occurred to bring us to X. Through the funding, Y will be attained by MM/DD/YYYY)

Levels of success:

- The current status is known, or X
- A solution has been selected to fix the current status,
- The solution will move us to Y by a certain date.
- Significantly improved will be attained if Y is 10 times better than X

- Improved will be attained if Y is 5 times better than X
- Not improved will be attained if X and Y are the same
- Worsened will be attained if Y is less than X

Another example or way to describe this process:

- What do I need the money for? (goal)
- What is my current status? (why do I need this goal)
- How do I know if I met my goal? (the benchmark and level of success)

(Goal or Need)- We need a new ambulance to because our old one is costing too much money to fix.

(Current status) The current ambulance cost the city \$15,000 to keep it running over the last two years. Based on what the unit maintenance history and current needs, it will cost another \$10,000 over the next 18 months.

(Success) If we get the new ambulance, it will save the City in maintenance costs to use the savings for other EMS related items. The savings will amount to a minimum of \$8,000.00 over the next 12 months.

Another example or way to describe this process:

The need identified is more personnel are needed.

Why are more personnel needed?

To continue the viability of the agency and decrease the number of times we relied on mutual aid and other agencies to respond to our area.

The applicant will use the funding to Increase the number of licensed personnel through training courses.

Specific and objective Metric:

Between 2013 and 2014- our agency used mutual aid 25 times because we lacked the personnel to respond to all of our requests for service.

After training, the agency will have increased our staff members by 5 licensed personnel

By the end of the contract period, mutual aid requests will be decreased by 50%.

Different objective levels are needed for each of the benchmark levels.

The section of evaluation will also need to include how the beginning and ending points for measurement were identified and calculated.

Based on the previous example, the data needed to measure this could include dispatch records, OKEMSIS records, and documents from the other agency.

Additional Points to consider

It is up to the applicant to identify how to measure the success and effectiveness of the program, but the application must include the following information:

- Each deliverable must have a way to measure success.
- Each measurement must have a beginning point, or current status.
- The current status must identify how the current status was measured or documented.
- The benchmark (Significantly Improved, Improved, Not Improved, and Worsened) must identify a level of success in a clear objective way.
- The way to measure success must be identified.

This section of the application must meet the minimum requirements from this regulation:

If this section is not submitted in a clear and complete manner, the response will not be evaluated.

See page describing process.

Guidance Checklist
(This is not required to be returned with the application.)

- The guidebook has been reviewed.
- The responses must be returned to the Department by: _____
- The changes and amendments to the application have been reviewed and returned.
- The instructions for the Solicitation have been reviewed.
- The supporting documents for the solicitation have been included.
- The solicitation has been signed by the appropriate person.
- The application has been complete.
- The qualified entity requirements have been met.
- Documents and narrative describing the “Need and Support” for the RFP are included.
- The question regarding the “Availability of other funding” has been answered.
- The attestations regarding “Project Feasibility” have been included.
- The “Demographic” questions have been answered to the applicant’s satisfaction.
- The appropriate “Statutory Purpose” fields have been included.
- The zip codes for the proposal area to determine “Population Density” have been included with supporting documents.
- A description and supporting documents for “Multiple Jurisdictions” have been included.
- The zip codes for the proposal area to determine the “Number of EMT’s have been included.
- The documents and narrative that supports the “Distance to a Trauma Center” have been included.
- A list or explanation of the “Proposed Expenditures” or items to be purchased has been included in Section 6. Supporting documents have also been included.
- If the response includes “Matching Funds”, those have been calculated and explained.
- Previous awards and benchmark letters have been included.
- The benchmark requirements for all the identified statutory purposes have been included.
- Each “Deliverable” or item that the contract will be used for has a benchmark measurement that includes, but not limited to:
 - what the current status is,
 - what the purchase will do to improve the current status,
 - numeric value that will measure how much improvement was completed.

While the Guidance Checklist is not required to be returned, the checklist(s) within the Solicitation documents is required to be submitted.