



SCANNING THE PUERTO RICO HEALTHCARE TECHNOLOGY ENVIRONMENT



Letter of Proposal

CONFIDENTIAL
San Juan, PR
September 2023

EXECUTIVE SUMMARY

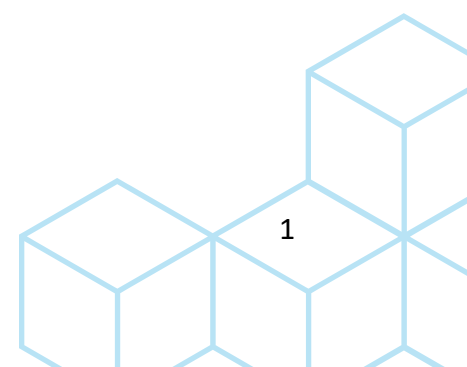
We are pleased to submit our proposal to conduct a scan of the healthcare technology environment of Puerto Rico, to assess the current state and progress in electronic health record (EHR) adoption and interoperability over the duration of the Medicaid Program to Promote Interoperability of Puerto Rico (MPPIPR).

V2A Consulting is partnering with Lateral Strategy to deliver a comprehensive study. V2A provides experience working with multiple stakeholders in the health care sector and expertise in healthcare markets analytics, and Lateral Strategy provides the expertise and network to conduct a robust quantitative study. We are confident that we can deliver a unique value proposition to the Puerto Rico Department of Health, uncovering deep insights to better assess the state of EHR adoption and HIT interoperability.

To deliver a comprehensive scan of the Puerto Rico healthcare technology landscape, we propose to survey a sample of 450 providers. To cover all the provider classes specified in the RFP, a target group refinement will be performed to ensure adequate representation of the different characteristics among providers and care settings. Different questionnaires may be developed to capture the relevant information from the different actors.

It is important to note that one of the main challenges we have identified over the years is recruiting healthcare workers to participate in a quantitative survey, because these professionals have demanding schedules and the critical nature of their work presents a significant limit to their availability to engage in research initiatives.

We will be leveraging our 20 years of experience in the Puerto Rico healthcare sector to identify contacts and obtain referrals to help meet the desired participation rate. Finally, we will leverage our firm's internal data and our team's ample experience and capabilities for analyzing data, particularly healthcare data, to produce the best possible result for this study.



Title Page

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Subject to acceptance by PRDoH, the vendor acknowledges that by submitting a response and signing in the space indicated below, the vendor is submitting a formal offer to meet that which is being requested within this RFP.



_____ / 9/13/2023 _____

Original signature of Signatory Authorized to Legally Bind the Company / Date

Name: Graciela Salcedo
Title: Director
Company Name: V2A Consulting
Physical Address: 644 Ave. Fernández Juncos
District View Plaza, Suite 401
San Juan, PR 00907
State of Incorporation: Puerto Rico

By signature hereon, the vendor certifies that:

1. All statements and information prepared and submitted in response to this RFP are current, complete, and accurate.
2. The vendor's response meets the requirement of this RFP.
3. The vendor will comply with all federal and Commonwealth laws, rules, and regulations that are in force currently or anytime during the term of a resulting contract.
4. The vendor acknowledges and accepts that the full response contents and associated documents will become open to public inspection in accordance with the laws of Puerto Rico. PRDoH will hold "confidential" all response information, including both technical and cost information, during the evaluation process, except for the questions and answers before the submittal of

- proposals. All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded in accordance with the laws of Puerto Rico.
5. The company represented here is an authorized dealer in good standing of the products and services included in this response.
 6. The vendor, any subcontracting partners, and its proposed resources are eligible to participate in this transaction and have not been subjected to suspension, debarment, or similar ineligibility determined by any federal, state, or local governmental entity; are in compliance with the Commonwealth's statutes and rules relating to procurement; and are not listed on the federal government's terrorism watch list as described in Executive Order 13224. Entities ineligible for federal procurement are listed at <https://sam.gov/content/home>.
 7. Prior to award, the vendor affirms it will have all current approvals, licenses, or other qualifications needed to conduct business in Puerto Rico.

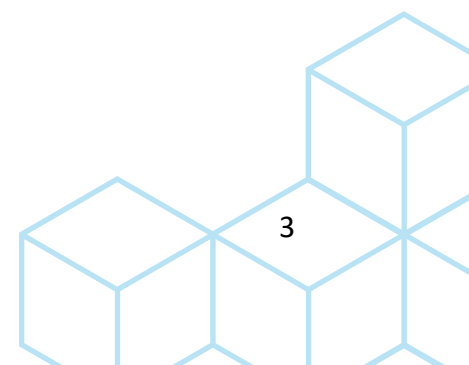


TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
Title Page	2
TABLE OF CONTENTS	4
APPROACH AND METHODOLOGY	5
Approach.....	5
Methodology	6
WORKPLAN AND TIMELINE.....	9
FIRM INFORMATION	11
About V2A.....	11
About Lateral Strategy	17
Project Organization and Staffing.....	22
REFERENCES	23
Vendor References.....	23
Subcontractor References	28
KNOWLEDGE OF PUERTO RICO HEALTH CARE LANDSCAPE	31
APPENDIX 1: TERMS & CONDITIONS	35
APPENDIX 2: STATEMENT OF WORK.....	37
1. Develop survey administration, execution, and analysis plan.....	37
2. Define/refine survey target groups and percentages for statistical validity.....	37
3. Develop survey questions and final survey tools in English and Spanish, conduct survey testing.	37
4. Develop survey methodology and outreach.	38
5. Administer the survey using multiple methods.....	38
6. Compile and analyze survey responses.	38
7. Develop charts, graphs, summarize findings and write up process for the final report.	39
APPENDIX 3: CASE STUDIES.....	40
Case Study #1: Understanding the healthcare industry in Puerto Rico	40
Case Study #2: Steering the healthcare innovation journey	42
APPENDIX 4: ORGANIZATIONAL CHART	44
APPENDIX 5: QUALIFICATIONS	46

APPROACH AND METHODOLOGY

Approach

To deliver a comprehensive scan of the Puerto Rico healthcare technology landscape, we propose to survey a sample of 450 providers, distributed among provider types as presented in Table 1. To cover all the provider classes specified in the RFP, a target group refinement will be performed to ensure adequate representation of the different characteristics among providers and care settings. Different questionnaires may be developed to capture the relevant information from the different actors.

In the case of institutions, such as hospitals, our focus will be both on individual providers who use EHR systems (e.g., physicians) and the individuals in charge of IT management and, specifically, in the management of the EHR system within the organization. This way we will capture information on the adoption by the user party, and also understand the level of adoption and interoperability, challenges, and barriers, from a technical perspective.

It is important to note that, to our knowledge, a study of this magnitude has never been conducted in Puerto Rico. One of the main challenges we have identified is recruiting healthcare workers to participate in a quantitative survey, because these professionals have demanding schedules and the critical nature of their work presents a significant limit to their availability to engage in research initiatives.

For this reason, we are recommending a "best efforts approach" to achieving the determined quotas. We will make every effort to meet the quotas and have budgeted generous incentives and recruitment resources to entice the targeted population to participate. Additionally, we will be leveraging our 20 years of experience in the Puerto Rico healthcare sector to identify contacts and obtain referrals to help meet the desired participation rate. Fieldwork may be aided by employers providing access to the target healthcare workers in their staff. For this purpose, a letter of endorsement from the PRDOH may also aid in the recruitment of participants.

Table 1: Proposed Sample

Provider Type	Population	Sample Size
Allied Health Professionals	1,663	50
Ambulance and Non-Emergency Medical Transport	274	10
Dentists	1,114	48
Durable Medical Equipment, Prosthetics and Orthotics	77	5
Home Health and Hospice	87	5
Hospital	54	3
Laboratory and Imaging	980	45
Mental Health Providers	1,635	30
Pharmacy	1,162	25
Physicians, midwives, and physician assistants	8,460	150
Primary/Outpatient Care (FQHCs, clinics, family planning, urgent care, multidisciplinary groups, vaccination centers)	467	15
Skilled Nursing and Rehabilitation Facilities	7	1
Specialty Centers (ambulatory surgery, diagnosis and treatment, dialysis, infusion, wound care)	183	10
Groups of Corporations	2,605	40
Rehabilitation facilities (inpatient & outpatient)	11	1
Added value services	224	12
Total	19,003	450

Methodology

The methodology we will apply to complete the scan will consist of 4 phases, summarized in Figure 1, and described in detail below.

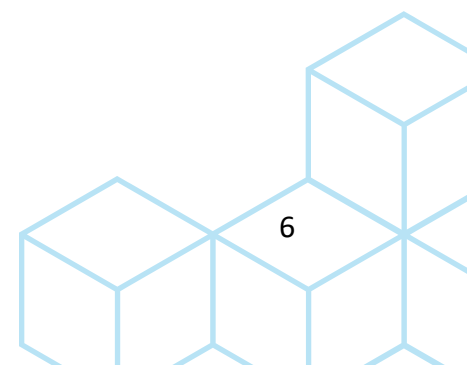
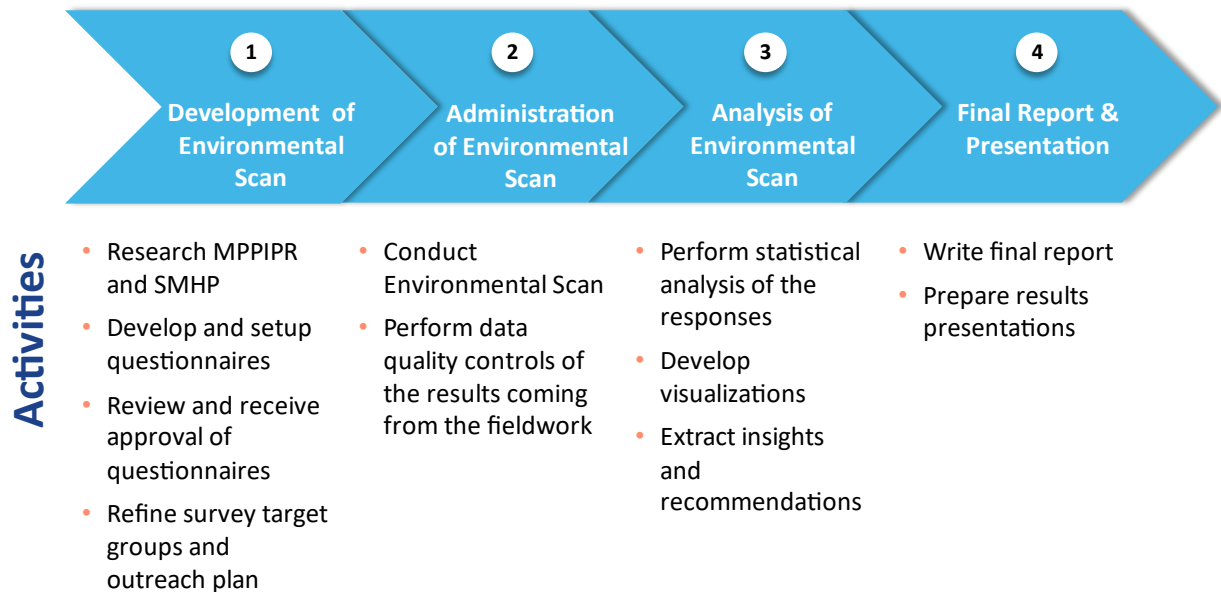


Figure 1: Methodology Phases



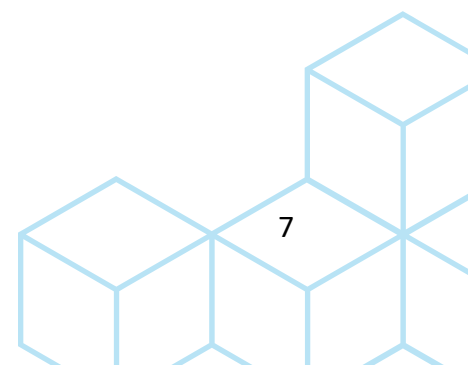
PHASE 1: DEVELOPMENT OF ENVIRONMENTAL SCAN

During this phase our team will study in detail all provided information on Medicaid Program to Promote Interoperability of Puerto Rico (MPPIPR) and the State Medicaid HIT Plan (SMHP) to guide the survey design and ensure an adequate alignment of the study and its results.

As per the RFP the resources to be made available by PRMP will include, at minimum:

- Final report requirements.
- Sample survey questions and process used in other states.
- Sample survey outcomes/reports from other states.

In parallel to the revision of program material, we will design and program up to 4 questionnaires variants, to be administered in an online format, as part of the scan to the different types of providers, care setting and participants, depending on their role. The questionnaire(s) will be revised by both our team and the PRDOH, to receive approval before starting its administration to participants.



PHASE 2: ADMINISTRATION OF ENVIRONMENTAL SCAN

The survey will be administered through a link in an online format, ensuring convenient access for participants. If the desired sample size is not achieved, we will complement email or text delivery with personal phone calls and in-person visits, if feasible, to ensure a higher response rate and data completeness. Our goal is to maximize participation and gather comprehensive insights from all potential respondents. The survey will be a maximum of 20 minutes in length.

Time intensity of recruiting 450 participants is expected to be a challenge based on our experience. As stated in the Approach, healthcare professionals have demanding schedules, and the critical nature of their work presents a significant limit to their availability to engage in research initiatives. We are allocating 6 months for recruitment and execution of fieldwork and expect this will be a viable timeframe. Nonetheless, close communication will be critical to stay aligned regarding fieldwork progress toward completion.

During this phase, regular quality control will be performed on responses to ensure we can extract the best possible insights.

PHASE 3: ANALYSIS OF ENVIRONMENTAL SCAN

After completion of the fieldwork, and validation of the compiled data, additional transformations may be necessary to get responses in a format adequate for analysis. Once data is ready for analysis, different statistical methods will be applied to extract insights and draw conclusions, aided by graphs, charts and tables to illustrate the results.

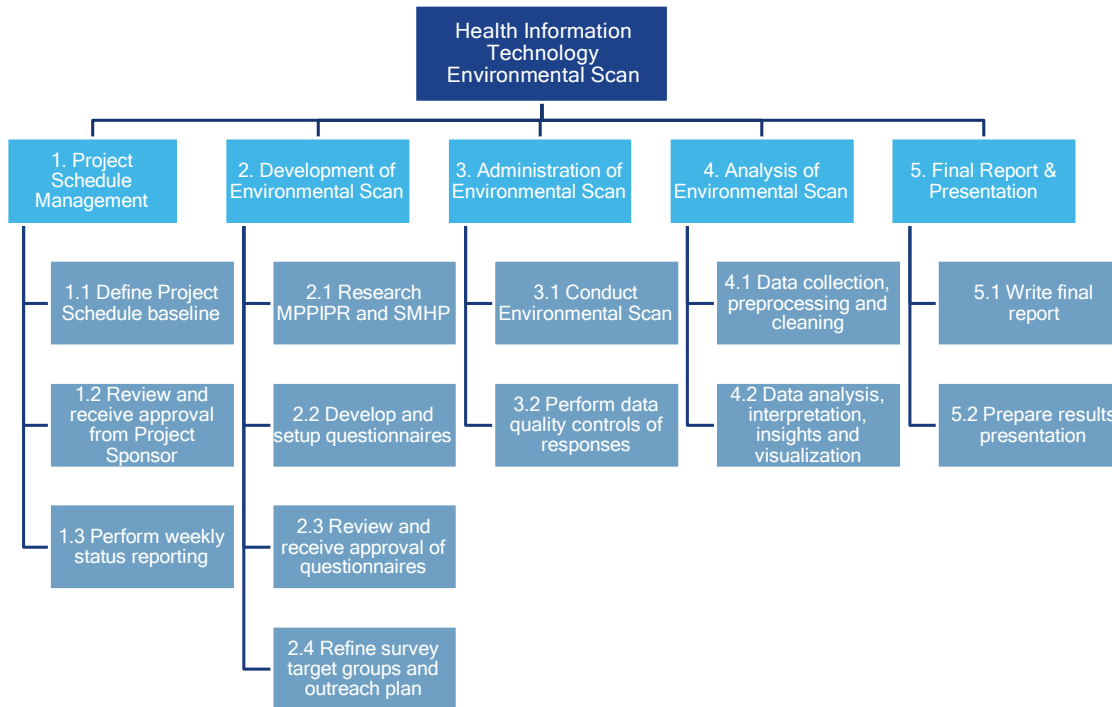
PHASE 4: FINAL REPORT & PRESENTATION

Based on the analysis of survey responses and applicable best practices, recommended actions will be developed to address the identified challenges and barriers to EHR adoption and interoperability. These recommendations, the main findings complemented with visuals and all pertinent details from the survey process and methodology will be put together in a final report and presentation.

WORKPLAN AND TIMELINE

The following figure illustrates the proposed phases for the project as a WBS showing how major tasks will decompose in activities.

Figure 2: Project Work Breakdown Structure



In terms of dependencies, activities 1.1, 1.2 and all activities of task 2 must be completed before starting to administer the survey (task 3). Activities 2.1 and 2.2 can happen in parallel but both must be completed before 2.3. Each of tasks 4 and 5 are dependent on the previous task.

Figure 3 helps illustrate the complete timeline and its dependencies, we estimate the duration of the project to be approximate 9 months, as stated above, we are proposing that the administration phase take 6 months, as recruiting 400+ participants is expected to be a challenge.

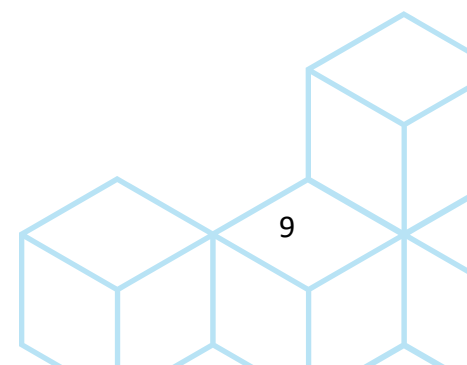
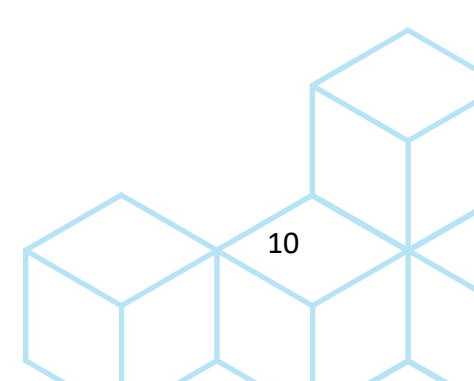


Figure 3: Proposed timeline

Activity	Month	1	2	3	4	5	6	7	8	9	10	11	12	Responsible
Project Schedule Management														V2A
Define Project Schedule Baseline		■												V2A/Lateral
Review and receive approval from Project Sponsor		◆												V2A/Lateral
Perform weekly status reporting		■	■	■	■	■	■	■	■	■	■	■	■	V2A/Lateral
Development of Environmental Scan														
Research MPPIPR and SMHP		■												V2A
Develop and setup questionnaires		■	■											Lateral/V2A
Review and receive approval of questionnaires			■	■										Lateral/V2A
Refine survey target groups and outreach plan		■	■	■										Lateral/V2A
Administration of Environmental Scan														Lateral
Conduct Environmental Scan			■	■	■	■	■	■	■	■				Label
Perform data quality controls of responses			■	■	■	■	■	■	■	■				Label
Analysis of Environmental Scan														V2A/Lateral
Data collection, preprocessing and cleaning								■	■	■				Lateral
Data analysis, interpretation, insights and visualization										■	■			V2A
Final Report & Presentation														
Write final report										■	■	■		V2A/Lateral
Prepare results presentation											■	■		V2A



FIRM INFORMATION

About V2A

V2A Consulting is a leading management consulting firm based in San Juan, PR with more than 18 years of experience helping clients define and achieve their objectives. Our mission is to serve, partner, and excel with the right clients, people, and community is present in everything we do. We are a trusted advisor to CEOs and top executives in service organizations across Puerto Rico and the Caribbean basin. We have supported dozens of organizations in Strategic Planning, Operational Excellence, Organizational Development and Market and Business Analytics.

We differentiate ourselves by our philosophy:

- We believe that management teams should “**own**” their strategic management processes. We don’t tell clients what to do but rather **work together** to find the right strategy together with **implementable** solutions.
- We believe in building **deep relationships** with a limited number of clients, allowing a comprehensive understanding of their business. We cherish the **trust** and **confidence** our clients place in us.
- We believe that our clients’ results define our success. More than just defining visions and plans, we emphasize the development of specific, high-impact **actions** and help our clients achieve **results... from Vision to Action**.

We are deeply committed to the success of our clients and adhere to the following guiding principles through our work:

- **Focus on impact.** We help clients achieve tangible short- and long-term impact.
- **Focus on strategy.** Our approach considers the strategic value of each engagement element, seeking to provide strategic insight into all aspects.
- **Know the culture.** We are keenly aware of cultural strengths and challenges and are thus able to adjust our recommendations to accomplish great results.

- **Remain independent.** We think independently and offer our vision without any agenda or bias.
- **Be practical.** The solutions offered are pragmatic and applicable from “day 1”, and we try to leverage our clients’ existing resources to minimize unnecessary or excessive investments.
- **Work as a Partner.** We believe in building lasting relationships, working together with our client’s leaders, and sharing their challenges and successes.

V2A’s Healthcare Practice has helped multiple organizations in both the private and public sector tackle complex strategic challenges, including payors, providers such as hospitals and medical groups, and regulatory entities.

V2A’s Market & Business Analytics Practice provides deep analytics services and regularly publishes dashboards, insights, and market reports. The main analytics services it provides are the following:

Market Research and Economic Trends: We help our clients to size market opportunities for new ventures. We perform analyses of economic, demographic, and industry trends for executive teams as part of their regular strategic planning sessions.





Business Intelligence and Reporting: We work with organizations to build their reporting infrastructure and train their personnel to use the most common visualization tools for dashboards and reports.

Financial Analysis and Forecasting: We assist organizations in financial planning and forecasting, performing cost-benefit analyses for new projects, and building client and client segments profitability and reporting (including cost allocation and transfer pricing).

Predictive Analytics, Machine Learning and AI: We use data mining and statistics to forecast potential outcomes of our customers’ operations and recommend the most appropriate actions under the expected scenarios. We train machine learning models to, among other things, make predictions, recommend the most suitable products at the point of sale, and segment the customer base to adapt the value proposition to each segment.

The following table shows a sample of recent engagements with clients:

Table 2: Sample of V2A’s Healthcare and Market & Business Analytics Experience

Focus Area	Year	Project Description
 Strategy	2022	• Design and implementation plan for the strategy of the Comprehensive Cancer Center of Puerto Rico
	2019	• Development of a 3-year Strategic Plan for a private hospital in Puerto Rico, with prioritized initiatives
	2012-2013	• Development of a Strategic Plan in medical, life and property insurance conglomerate
 Project Management	2016 - 2021	<ul style="list-style-type: none"> • Design and implementation of project management office (PMO) in medical, life and property insurance conglomerate • Management of a portfolio of over 100 initiatives across all departments in the organization • Help conduct monthly governance meetings and visibility of portfolio status
	2020-2021	• Change Management Support in the transition to a new eligibility platform in a Medicaid agency with over 600 impacted employees
 Organization	2019	• Redesign of sales unit to maximize sales in insurance company
	2021-2022	• Toolkit developed using Power Apps and Power BI to guide in the implementation of a centralized grants management office and electronic grants management system. The toolkit includes a set of dashboards to monitor KPIs.
 Market and Business Analytics	2019	• Development and implementation of an application to digitize the subscription sales process in a Medicare Advantage plan in the U.S.

Focus Area	Year	Project Description
 Operational Excellence	2021	<ul style="list-style-type: none"> • Diagnosis, design and implementation of a program to improve the providers' experience with insurance company. • Definition of the transformational vision, organizational redesign of provider contracting and service units, and mapping of the provider journey
	2019	• Improvements in health plan enrollment, underwriting and billing processes using LEAN methodology
	2022	• Management of the proposal development process in two insurance companies to participate in the government health plan
	2018- 2019	• Development of clinical and financial models for the new plan contract
	2018	<ul style="list-style-type: none"> • Design and implementation of sales and promotions stimulation program in an insurance company, focused on Medicare Advantage that resulted in a substantial increase in sales and a reduction in disenrollments to the plan • Executive dashboard design to monitor sales, retention and disenrollment during the subscription period • Improvements in the process of designing products and benefits in medical plans fostering inter-departmental collaboration
	2018	• Diagnostic, design and implementation of initiatives to improve service to policyholders in an insurance company
	2017	• Improvements in insurer claim processes using LEAN methodology

Focus Area	Year	Engagement Description
 <p data-bbox="365 451 576 525">Market Research and Economic Trends</p>	2023	<ul style="list-style-type: none"> Market research study aimed at understanding the current state and nuances of the healthcare industry in Puerto Rico. Deliverables included a complete deck with the findings and recommendations, a database with all the information gathered and a Tableau dashboard with key interactive visualizations. Market research aimed at understanding the current economic trends in Puerto Rico, the federal economic stimulus planned for the next five years, and the impact these stimulus could have on the island's economic environment
	2022	<ul style="list-style-type: none"> Market research for a new banking entity applying for FDIC approval Report on current economic trends for publicly traded payment processing institution Assessment of economic impact from Federal stimulus package in Puerto Rico
	2020	<ul style="list-style-type: none"> Study of the socioeconomic contributions of the PR's banking sector for the PR Bankers Association
	2019	<ul style="list-style-type: none"> Market research of the Puerto Rico auto financing industry for a new used auto loan financial institution

Our Leadership and Key Staff

At V2A Consulting, we are proud of our team of 70+ talented professionals who share a passion for delivering value. Our core team has extensive experience in a variety of management fields developed through leadership positions with multinational corporations, together with professional experiences at leading consulting firms and solid educational backgrounds from top universities. Detailed credentials of V2A's engagement team leaders that will be collaborating in this engagement are included in [Figure 4](#) below:

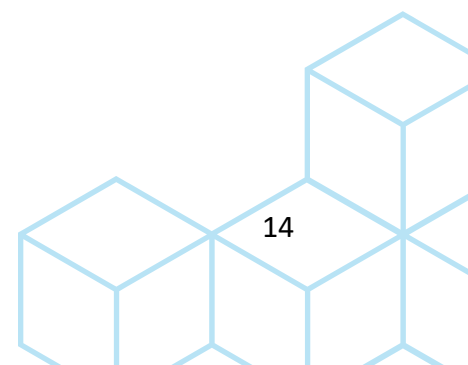


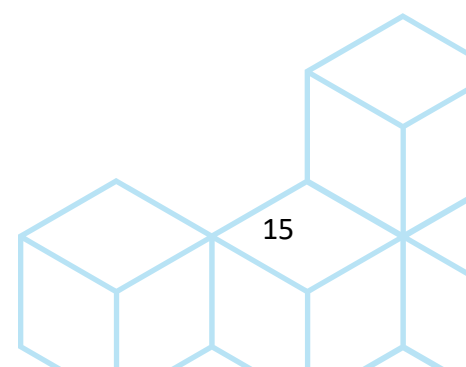


Figure 4: Key Staff and Relevant Experience

Name	Experience
 <p data-bbox="212 667 456 737">Graciela Salcedo Director</p>	<ul style="list-style-type: none"> Graciela Salcedo has more than 20 years of experience in the areas of process improvement, strategic planning, project management and brand management at Procter & Gamble. She leads the Healthcare sector practice in the firm, with experience supporting medical plans, hospitals, health providers and regulatory entities. Graciela has a BS in Mechanical Engineering from the University of Pennsylvania; and a Master’s Degree in Industrial Engineering from the Rochester Institute of Technology. Additionally, she attended Harvard University’s Leading Professional Service Firm’s program.
 <p data-bbox="250 1289 407 1352">Xavier Diví Director</p>	<ul style="list-style-type: none"> Xavier Diví has over 15 years of experience in various financial and economic development areas. Xavier currently manages most of the content development for our knowledge-sharing publications. He leads our expanding Applied Business Analytics practice specializing in Predictive Modeling, Market and research intelligence, Clustering/segmentation analyses, and Geographic analytics. Xavier has a BS & MBA from the ESADE Business School in Spain





Coral Frederique
**Engagement
Manager**

- Coral brings over 8 years of experience in management consulting, government fiscal and financial restructuring, strategic planning, and pharmacy benefit management. Previous experience includes Senior Manager of Rebate Operations and Underwriting in Abarca Health and Associate Director of Fiscal Restructuring at Puerto Rico Fiscal Agency and Financial Advisory Authority (MFAF).
- Coral holds a BS in Finance and Accounting from the University of Puerto Rico Río Piedras



José Pablo Pérez
**Analytics
Manager**

- José Pablo has extensive experience in Market research and intelligence, as well as data reporting and clustering/segmentation analyses. He has also managed geographic analytics. He has experience in business strategy and analysis, lean methodology, process optimization, and organization development. Currently focused on providing analytics solutions to our clients.
- Massachusetts Institute of Technology (MIT); B.S. & M.S.
- Quantic School of Business Technology; MBA



Elvi Torres
**Data
Engineer**

- Elvis has several years of experience with ETL processes, data analysis and visualizations. Experienced with coding languages and structured data applications. Elvis created and developed V2A's Social Determinants of Health (SDoH) dashboard.
- Elvis holds a Bachelor in Science from the University of Puerto Rico, Río Piedras campus and a PhD in Environmental Science

V2A is pleased to partner with Lateral Strategy to propose a scan of the healthcare technology environment of Puerto Rico, which brings together the best talent, expertise, and experience from both organizations.

About Lateral Strategy

Lateral Strategy is a market research and innovation firm based in Puerto Rico, specializing in the healthcare industry. With over 10 years of experience, we possess unmatched knowledge of the local landscape, making us the ideal partner for healthcare organizations seeking innovative solutions tailored to Puerto Rico's unique market.

Our team of experienced strategists and consultants combines lateral thinking with strategic problem-solving, enabling us to uncover unique opportunities and challenge the status quo in the healthcare sector. We are dedicated to executing high-quality studies and delivering actionable insights that help our clients succeed.

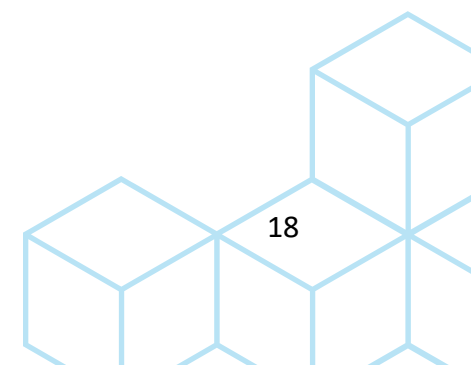
Our localized expertise sets us apart from larger global firms, providing us with a distinct advantage in the healthcare industry. At Lateral Strategy, we employ a comprehensive approach to address the complexities of Puerto Rico's healthcare system. Through successful partnerships with numerous healthcare organizations on the island, including health insurance companies, pharmaceutical manufacturers, hospitals, and pharmacies, we have gained valuable insights that allow us to drive meaningful impact in the industry.

As a research group, we specialize in Human Centric Research, using techniques that focus on understanding participants and identifying new opportunities.

A list of some of our recent project can further portray our experience:

Industry	Project Objectives	Methodology
Hospital	Co-create a Journey for success to create best hospital employer in the area	<ul style="list-style-type: none"> 36 one on one interviews to understand Md's, Nurses and other workers -what they expect, how they feel and - most importantly - what they need from a Hospital. 4 Facilitations to co-design new concept based on learnings, develop and test
Health Insurance	Understand Advantage Selection Process	<ul style="list-style-type: none"> 12 in depth 1:1 interview with Advantage users and decision makers (could be caregiver) - Immersive mobile research with 36 Advantage Users enabling us to get closer to the moments that matter most and learn what life is really like for users. Optimized with an interactive journaling exercises leveraging WhatsApp with 12 Advantage users and decision makers (could be caregiver)
Health Insurance	Increase generation of e-commerce lead (younger segment). Identify the Primary Drivers & Barriers To Adoption & Usage	<ul style="list-style-type: none"> Social Media sentiment Analysis to gain insights into the public's attitudes, emotions, and opinions towards the brand, enabling informed decision-making and tailored strategies. 4 triads with potential consumers (ages of 26 to 34) 2 focus group interviews with potential leads
Health Insurance	Improve the overall effectiveness and impact of Office Advantage to produce sales lead	<ul style="list-style-type: none"> 8 Observation days MD's Office Administrators 12 in-depth interviews with physicians 24 in-depth interviews with physician assistants –

Industry	Project Objectives	Methodology
Specialty Pharmacy	Co-create a Journey for success to create best hospital employer in the area	<ul style="list-style-type: none"> 36 one on one interviews to understand Md's, Nurses and other workers -what they expect, how they feel and - most importantly - what they need from a Hospital. 4 Facilitations to co-design new concept based on learnings, develop and test
Pharmaceutical Company	Understand Advantage Selection Process	<ul style="list-style-type: none"> 12 in depth 1:1 interview with Advantage users and decision makers (could be caregiver) - Immersive mobile research with 36 Advantage Users enabling us to get closer to the moments that matter most and learn what life is really like for users. Optimized with an interactive journaling exercises leveraging WhatsApp with 12 Advantage users and decision makers (could be caregiver)
Pharmaceutical Company	Discover what would make youth respond to a vaccine's message and collaboratively develop (MD's, Ad Agency and Lateral Strategy) to a more strategic communication campaign.	<ul style="list-style-type: none"> 4 focus groups with youth 18-21 Years old 2 Focus groups with youth parents and 2 Sensemaking & Ideation Facilitations with Md's, Advertising Agency and Pharmaceutical Company where the learnings were used to inspire more meaningful ideas. This study was conducted for multiple vaccines



Industry	Project Objectives	Methodology
Pharmaceutical Company	Developing insight-based-strategies to increase vaccination rates among adults in the United States and Puerto Rico, in collaboration with the Centers for Disease Control	<ul style="list-style-type: none"> • Thirty 1:1 in depth interviews with Decision Makers at the Awardee (state level) • Five 1:1 in depth interviews with public health officials at the CDC (federal level) • 20 focus groups interviews with adults with a completed vaccination schedule • 20 focus groups interviews with adults with an incomplete vaccination schedule • 1,000 quantitative interviews to confirm and quantify findings from focus groups
Pharmaceutical Industry Association	Stakeholder mapping Puerto Rico's dynamic payor system for the Puerto Rico Pharmaceutical Industry Association (PIA)	<p>Multiple 1:1 interviews with thought leaders in the following organizations:</p> <ul style="list-style-type: none"> • PBMs & health insurance • Procurador del Paciente • ASES • Comisionado de Seguros • Key physicians within IPAs, Hospitals and other health networks
Patient Advocacy Organization	Develop and Advocacy and Prevention Campaign for at risk minorities in the United States with Sponsors from Pharmaceutical Companies	<ul style="list-style-type: none"> • Kidney Disease Patients & Caregivers Ethnography with 21 panelists for a 7-day engagement identify insights to understand the barriers to care and checkups, preconceived notions of kidney disease, and find ways to generate awareness about kidney disease • 3 facilitations with Sponsors to make sense out of the data, optimize the stimulus and further align to test 3 concepts with other stakeholders.
Industry	Project Objectives	Methodology
Pharmaceutical Company	Conducting market assessments and forecasts for multiple product launches in therapeutic areas such as: hematology-oncology, respiratory, rheumatology, gastroenterology, endocrine, dermatology, and transplant disease states	<p>Methodologies varied according to disease state, but included a mix of:</p> <ul style="list-style-type: none"> • Secondary syndicated data analysis (IQVIA, Syneos, ZS, among others) • Epidemiological data analysis • Primary research with qualitative (1:1 in depth, triads, focus groups, ethnography, patient & physician journaling, patients record monitoring, case studies) and quantitative methodologies: • KOL interviews • Health Care Physician and stakeholders (assistants, nurses, etc) interviews • Patient Interviews • Payor interviews • Government and public policy experts • Hospital administrators • Relevant Wholesaler and Pharmacy decision makers (Point Of Sales) • Patient Advocacy Organizations

Figure 5 below shows our leadership team, who will be overseeing the project:

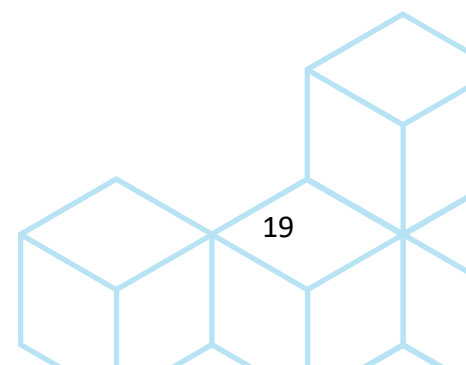


Figure 5: Lateral Leadership and Relevant Experience



Alexandra Suárez Carlo

Alexandra Suárez Carlo is the Founder of Lateral Strategy. She graduated from Cornell University and pursued an MBA with a concentration on Consumer Behavior from ESADE University in Barcelona.

With over 20 years of experience in Market Research and Brand Strategy, Alexandra has developed a unique research philosophy: tackle every project with the intention to uncover insights that lead to innovation, always seeking to understand the HUMAN behind the client or consumer. A strategist at heart, Alexandra dissects issues from various angles to unearth actionable insights.

Alexandra has used research techniques to uncover insights and facilitate innovation development for Fortune 500 companies. In Puerto Rico, she has specialized in insight hunting for the healthcare industry, helping a variety of customers develop solutions for patients. Some of her customers include payors Triple S, MMM, and Abarca, pharmacy networks like Alivia Health, pharmaceutical companies like Bristol Myers Squibb, hospitals Auxilio Mutuo and Hospital La Concepción, and the American Kidney Fund patient organization.

Alexandra is certified to teach innovation frameworks including Creative Problem Solving, Design Thinking and Synectics.

When not working, she spends most of her time educating others (from teachers to her two kids) on the power of growth and creative mindsets.

On a personal level, she describes herself as an optimist who believes creativity can change the world.



Natacha Suárez Carlo

Natacha Suárez Carlo is a top business leader with over 25 years of experience in the areas of Strategic Planning & Operations, Sales & Marketing, Marketing Research and Analytics, Business Improvement, and People Management and Development within the Bio-Pharmaceutical and Healthcare Industry.

As an expert planner, Natacha has directed Strategic and Operating Planning Processes, aligning product plans and operational processes, conducting capability and capacity assessments, and allocating company resources to efficiently support people, product and patient strategies.

Some notable projects managed by Natacha have been:

- Stakeholder mapping Puerto Rico's dynamic payor system for the Puerto Rico Pharmaceutical Industry Association (PIA)
- Developing insight-based-strategies to increase vaccination rates among adults in the United States and Puerto Rico, in collaboration with the Centers for Disease Control
- Conducting market and forecasts for multiple product launches in therapeutic areas such as: hematology-oncology, respiratory, rheumatology, gastroenterology, endocrine, dermatology, and transplant disease states.
- Implementing workforce engagement surveys to increase job satisfaction and retention among various organizations, as well as developing plans to address engagement opportunities.

Most recently, Natacha transformed Puerto Rico's largest specialty pharmacy to leadership position by developing state of the art clinical programs, negotiating key payor contracts, and right sizing and developing its workforce.

She now works with Lateral Strategy as its main Business Partner, focusing on healthcare projects.

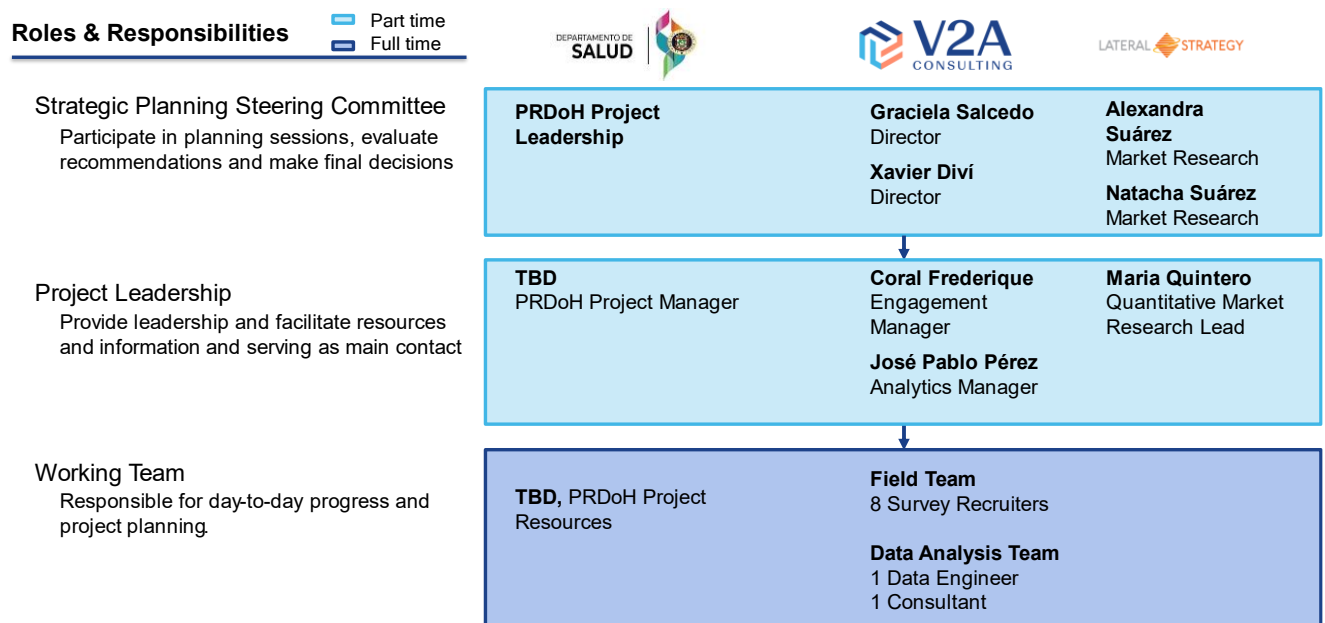
Natacha lives in San Juan with her husband and two teenage children. She enjoys running, hiking, and sailing, and is an avid reader of fiction in her spare time.

Project Organization and Staffing

V2A is proposing a team structure as shown in Figure 6. Graciela Salcedo (V2A Director), Xavier Diví (V2A Director), Alexandra Suárez (Director Lateral Strategy) and Natacha Suárez (Director Lateral Strategy) will serve as Account Managers for this project. As Account Managers, we will be responsible for overall delivery of the project and will be available to the PRDOH throughout the life of the engagement. We will serve as the main liaison with PRDOH throughout all the stages of the project.

Coral Frederique will serve as a full time Lead Project Manager, serving as Project Management liaison with PRDOH PMO. She will oversee the fieldwork team in collaboration with Maria Quintero (Quantitative Market Research Lead), as well as the data analysis team assisted by Jose Pablo Pérez (V2A Analytics Manager).

Figure 6: Proposed Team Structure



REFERENCES

Vendor References

Table 3: Vendor Reference #1

Vendor Information		
Vendor Name: V2A Consulting	Contact Name:	Graciela Salcedo
	Contact Phone:	787-919-7303
Customer Information		
Customer Organization: Guidewell/Triple-S	Contact Name:	Griselle Bigio
	Contact Title:	Strategy Planning Senior Director, Triple-S
Customer Address: P.O. Box 363628 San Juan, PR 00936-3628	Contact Phone:	(787) 749-4949 ext. 832-4548
	Contact Email:	griselle.bigio1@ssspr.com

Project Information:	
Total Vendor Staff:	6 people: 1 Engagement Director, 1 Engagement Manager, 1 Associate, 1 Data Engineer and 2 Subject Matter Experts (SME)
Project Objectives: Understand the current state and nuances of the healthcare industry in Puerto Rico, including adoption of digital platforms.	
Project Description: Market research study aimed at understanding the current state and nuances of the healthcare industry in Puerto Rico, including adoption of digital platforms.	
Vendor's Involvement: Perform market research study to understand the nuances of the Puerto Rico landscape (overall and regionally) and contracting dynamics of key healthcare providers such as Primary Care Physicians and Medical groups, specialists, clinics, hospitals and other ancillary. Deliverables included a complete deck with the findings and recommendations, a database with all the information gathered and a Tableau dashboard with key interactive visualizations.	
Project Benefits: Market research to inform executive strategic decision-making process, dashboard for on-going use of information, clear executive level insights of key strengths, weaknesses, and opportunities for Guidewell and its competitors.	
Key Personnel	
Graciela Salcedo	Engagement Director
Coral Frederique	Engagement Manager
Lily Colón	Associate
Elvis Torres	Data Engineer
Natacha Suárez	Market Research SME
Stivaly Gómez	Digital Platform SME
Project Measurements:	

Estimated Project One-time Costs: \$220,000		Actual Project One-time Costs: \$220,000	
Reason(s) for change in value: N/A			
Original Value of Vendor's Contract: \$220,000		Actual Total Contract Value: \$220,000	
Reason(s) for change in value: N/A			
Estimated Start & Completion Dates:	From:	July 1, 2023	To: September 22, 2023
Actual Start & Completion Dates:	From:	July 1, 2023	To: Ongoing
Reason(s) for the difference between Estimated and Actual dates: N/A			
If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: N/A			

Table 4: Vendor Reference #2

Vendor Information	
Vendor Name: V2A Consulting	Contact Name: Graciela Salcedo
	Contact Phone: 787-919-7303
Customer Information	
Customer Organization: Puerto Rico Medicaid Program	Contact Name: Luz (Nildy) Cruz
	Contact Title: Director of Operations
Customer Address: 268 World Plaza, Suite 505 Ave. Muñoz Rivera Hato Rey, PR 00917	Contact Phone: 787-765-2929 ext. 6732
	Contact Email: luz.cruz@salud.pr.gov
Project Information:	
Total Vendor Staff:	7 people: 1 Engagement Director, 1 Engagement Manager, 2 Consultants, 3 Subject Mater Experts.
Project Objectives: To create understanding, involvement, and ownership within the regional and local office staff members to embrace the opportunities created by the new E&E [MEDITI3G] system.	
Project Description: The project consisted in Change Management Support in the transition to a new eligibility platform in a Medicaid agency with over 600 impacted employees.	

Vendor’s Involvement:

- Understand the current state of key stakeholders’ mindsets and behaviors towards current and proposed changes in processes and systems
- Design a structured change management program aimed at coaching and supporting key stakeholders in embracing the changes and mitigating any resistance
- Facilitate the implementation of the approved project OCM plan, particularly previously defined communications, and training plans, as well as additional training and coaching to local and regional office staff to ensure the desired mindsets and behaviors are adopted

Project Benefits:

- Implementing a change management program to support the implementation of the new eligibility systems, allows the Medicaid program to understand and manage the level of readiness of the Program for the transition identifying operational roadblocks and areas of resistance within its culture, as well as the potential levers in the Program’s “way of doing things” that could accelerate and deepen its adoption.
- Monitoring, measuring, and analyzing the level of readiness (before implementation), and the level of adoption (during implementation) allows the program to implement corrective measures when and where needed to ensure a progressive transition, minimizing setbacks, and operational disruptions.

Key Personnel:

Graciela Salcedo	Engagement Director
Paul Cohen	Engagement Manager
Marlene De Varona	LEAN Methodology and Training SME
Carmen Denton	Training SME
Margarita Gregorio	Communications SME

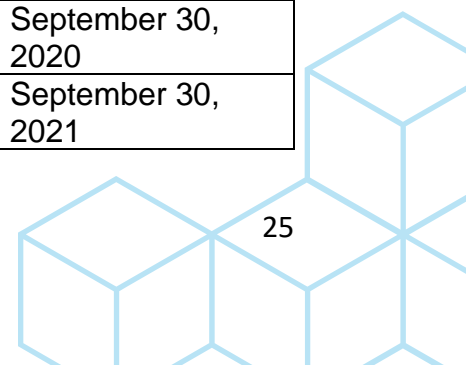
Project Measurements:

Estimated Project One-time Costs: N/A	Actual Project One-time Costs: N/A
Reason(s) for change in value: N/A	

Original Value of Vendor’s Contract: \$646,500	Actual Total Contract Value: \$1,831,500
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Reason(s) for change in value:
 The initial Go-live date for MEDITI3G was moved from October 2020 to April 2021, then to June 2021 (mainly due to the COVID-19 lockdown’s disruption). The Program requested V2A to extend the support during the implementation until September 2021.

Estimated Start & Completion Dates:	From:	March 16, 2020	To:	September 30, 2020
Actual Start & Completion Dates:	From:	March 16, 2020	To:	September 30, 2021

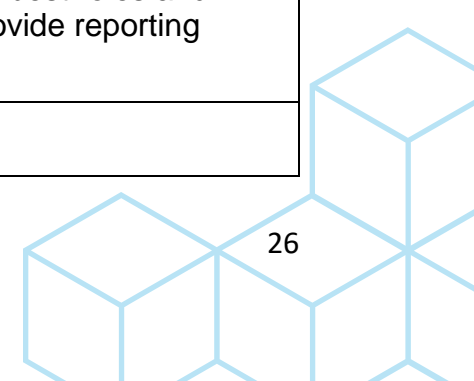


Reason(s) for the difference between Estimated and Actual dates: The initial Go-live date for MEDITI3G was moved from October 2020 to April 2021, then to June 2021 (mainly due to the COVID-19 lockdown's disruption). The Program requested V2A to extend the support during the implementation until September 2021.
If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: N/A

Table 5: Vendor Reference #3

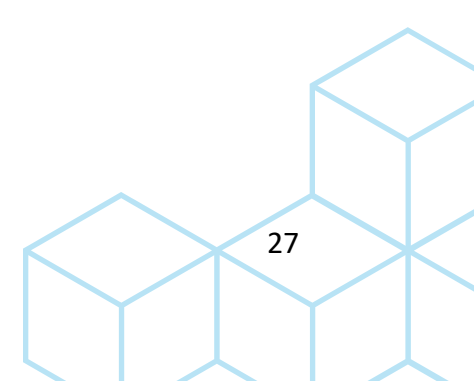
Vendor Information		
Vendor Name: V2A Consulting	Contact Name:	Graciela Salcedo
	Contact Phone:	787-919-7303
Customer Information		
Customer Organization: ASTHO Association of State and Territorial Health Officials	Contact Name:	Neyling Fajardo
	Contact Title:	Director Territorial Support
Customer Address: 600 Peachtree Street NE, Suite 1000, Atlanta, GA 30308	Contact Phone:	571-527-3156
	Contact Email:	nfajardo@astho.org

Project Information:	
Total Vendor Staff:	4 people: 1 Engagement Director, 1 Engagement Manager, 1 Business Analyst, and 1 Analytics SME
Project Objectives: Develop a toolkit to guide Health Departments in implementing and sustaining a more centralized Grants Management Office to maximize federal funding outcomes.	
Project Description: The project consisted of two phases: <ul style="list-style-type: none"> • Diagnose – Data Collection & Analysis. Understand strengths and opportunities for improvement in existing PRDOH grant management structure and other state and territory Health Departments • Design – Toolkit Development. Formulate a design framework and develop tools to determine human resources gap analyses, suggest best roles and responsibilities configuration, define cost allocation, and provide reporting mechanisms. 	
Vendor's Involvement:	



- Diagnostic of existing PRDOH grant management structure and other state and territory Health Departments
 - Development of a toolkit framework that took into consideration Organization, Accounting and Reporting attributes related to the grant management process.
- Project Benefits:** Centralize key functions at Grant Management Office to improve transparency, accountability, and reporting, as well as streamline management of grants and financial reports at PRDOH to maximize the utilization of federal grant funds.

Key Personnel			
Graciela Salcedo		Engagement Director	
Geraldine Rodríguez		Engagement Manager	
Jesús Hernández		Business Analyst	
Xavier Divi		SME Analytics	
Project Measurements:			
Estimated Project One-time Costs: n/a		Actual Project One-time Costs: n/a	
Reason(s) for change in value: n/a			
Original Value of Vendor's Contract: \$120,000		Actual Total Contract Value: \$120,000	
Reason(s) for change in value: n/a			
Estimated Start & Completion Dates:	From:	January 14, 2021	To: June 22, 2021
Actual Start & Completion Dates:	From:	February 4, 2021	To: June 30, 2021
Reason(s) for the difference between Estimated and Actual dates: Additional week was included in contract due to delays in signing NDA agreement with PRDOH.			
If the vendor performed the work as a subcontractor, the vendor should describe the scope of subcontracted activities: N/A			



Subcontractor References

Table 6: Subcontractor Reference #1

Subcontractor Information		
Vendor Name: Lateral Strategy	Contact Name:	Alexandra Suárez
	Contact Phone:	7875655660
Customer Information		
Customer Organization: Abarca Health	Contact Name:	Sonymarie Socarras
	Contact Title:	Strategy to Execution Senior VP
Customer Address: 650 Av. Luis Muñoz Rivera #701, San Juan, 00918	Contact Phone:	
	Contact Email:	sonymarie.socarras@abarcahealth.com
Project Information		
Total Vendor Staff:	6 individuals	
Project Objectives: The project aimed to understand different stakeholders' needs and barriers, design a solution for delivering prescriptions to a patient's home, and test four high-level concepts with stakeholders for refinement.		
Project Description: The project consisted in conducting all the Research necessary to understand stakeholders' needs and barriers, design the desired solution and gather the feedback from stakeholders to refine the 4 high-level concepts. Stakeholders involved: PBM Leaders, Md's, Office Administrators, Pharmacists, Patients and Caregivers		
<p>Vendor's Involvement: Innovation in healthcare is often a complex and ambiguous process, especially when it involves transforming traditional practices. Our involvement in the project included the stakeholder research, the solution design, and the testing of the 4 high-level concepts, this was achieved through the following activities:</p> <ul style="list-style-type: none"> • 24 One on one interviews with Md's and Office Administrators, Pharmacists and PBM leaders • 8 Focus Groups with Patients and Caregivers • 200 reactions from Pharmacists, Md's, Office Administrators, Patients and Caregivers for the 4 Concepts developed (video and storyboard concept-tests) • 10 Facilitations with diverse stakeholders to address the barriers and challenges found in the research, co-design a user centric solution & problem-solve how to implement the Rx Delivery System. 		

Project Benefits: The research methodically steered the innovation journey, grappling with the complexity and uncertainties inherent in healthcare innovation. It guaranteed that the individuals crafting the solution were well-informed, leading to the creation of a user-friendly product that catered to the requirements of all stakeholders. This, in turn, paved the way for the successful adoption of Rx Delivery program and enhanced patient care and caregiver’s lives.

By conducting thorough research and engaging with various stakeholders, the approach ensured a deep understanding of their needs, pain points, and preferences. We identified early within the process the barriers we would encounter, including the reluctance of some MDs to use e-prescriptions, as well as opportunities Rx Delivery would entail for caregivers. These barriers and opportunities were then leveraged in the solution design. The data driven and iterative nature of the methodology allowed the team to choose, improve and address implementation issues as they rouse.

Key Personnel

Name: Alexandra Suarez	Role: Founder
Name: Natacha Suarez	Role: Senior Healthcare Consultant

Project Measurements:

Estimated one-time costs: \$97,000	Actual one-time costs: \$97,000
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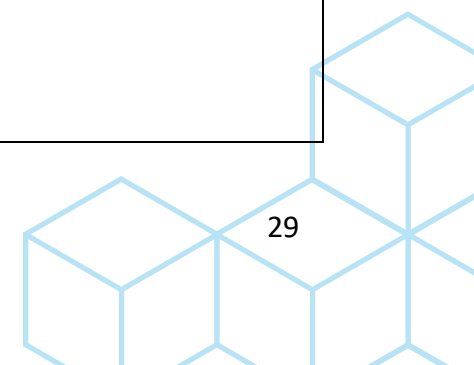
Reason(s) for change in one-time cost:

Original Value of Vendor's Contract: \$97,000	Actual Total Contract Value: \$97,000
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Reason(s) for change in value:

Estimated Start & Completion Dates:	From:	October 2018	To:	December 2018
Actual Start & Completion Dates:	From:	October 2018	To:	December 2018

Reason(s) for difference between Estimated and Actual dates:



If the vendor performed the work as a Subcontractor, the vendor should describe the scope of subcontracted activities:

KNOWLEDGE OF PUERTO RICO HEALTH CARE LANDSCAPE

V2A's Knowledge of Puerto Rico Healthcare Landscape comes from the work performed by its Healthcare Practice over the years and the combined experience of its members. As expressed before, V2A's Healthcare Practice has collaborated with multiple private and public sector healthcare organizations, including payors, providers such as hospitals and medical groups, and regulatory entities. Additionally, as part of its knowledge generation, the Healthcare Practice publishes articles about the sector and the practice frameworks, podcasts where we discuss relevant topics with important actors of the sector, and the Social Determinants of Health for Puerto Rico Dashboard, to offer to the public part of the cumulative information and knowledge the firm manages and monitors. The Analytics Practice publishes the Puerto Rico Economic Dashboard, that summarizes its economic situation through a series of indicators.

The following are links to some of the key Health Care insights published in the last year:

Insights:

- [Healthcare in Puerto Rico: Challenges and Our Big Opportunity](#)
- [Improving the Health of Puerto Rico Hospitals](#)
- [Social Determinants of Health: Understanding the Drivers of Health Disparities](#)

V2A Talks Podcast: Healthcare

- [Una conversación sobre la innovación social para mejorar la equidad en salud](#)
- [Una conversación Lic. Humberto Pérez, Director Ejecutivo del Hospital Dr. Susoni](#)

V2A Dashboard:

- [Social Determinants of Health Dashboard](#)

Figure 8 and Figure 7 shows snapshot of both Dashboards, they can be found in V2A website and are continually updated.

Figure 7: Social Determinants of Health for Puerto Rico Dashboard

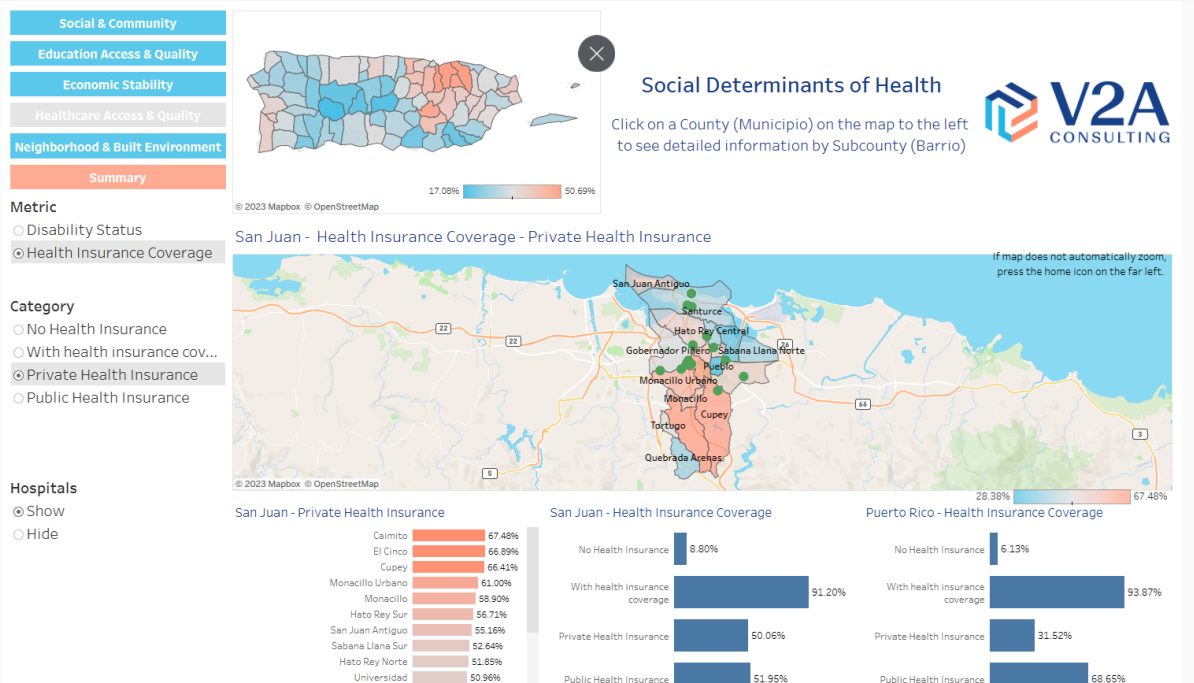
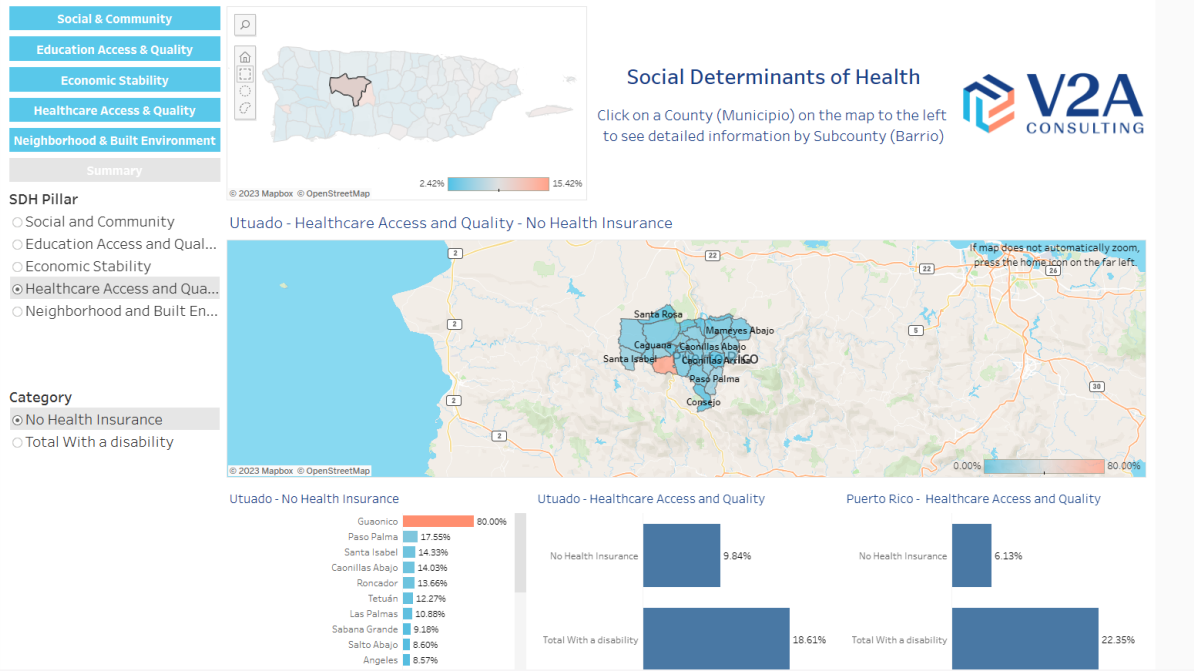
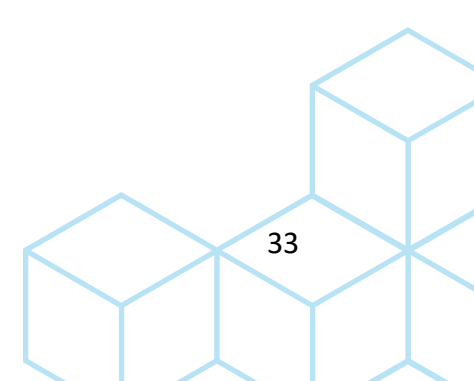
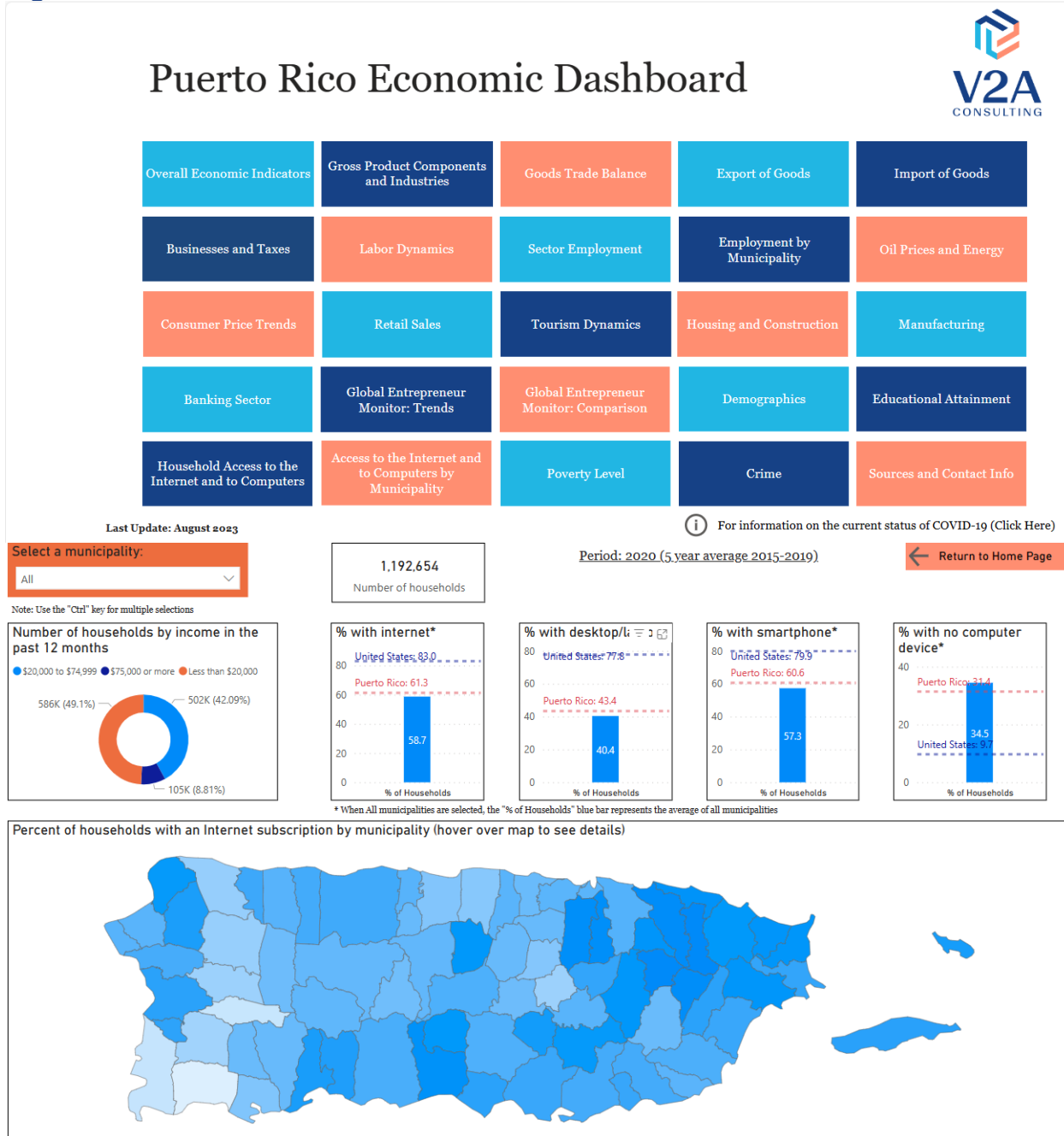


Figure 8: Puerto Rico Economic Dashboard



To expand on its Knowledge of Puerto Rico Healthcare Landscape, V2A is partnering with Lateral Strategy, a market research and innovation firm based in Puerto Rico specializing in the healthcare industry, adding more than 10 years of experience performing Market Research studies and more than 20 working with different actors of the healthcare landscape in Puerto Rico. The combined experience, knowledge, and professional network of V2A and Lateral Strategy, presents an unmatched knowledge of the local healthcare landscape.

APPENDIX 1: TERMS & CONDITIONS

WARRANTIES AND LIABILITIES

V2A, LLC (“V2A”) will exercise due professional care and competence in the performance of the services. However, V2A assumes no responsibility for any decisions made by the Puerto Rico Department of Health (PRDOH), which are appropriately those of management. In no event, regardless of the legal theory advanced, shall V2A be liable or responsible to any person or entity including, but not limited to, PRDOH other than for its gross negligence and any such liability shall be limited to the amount actually paid to V2A under this agreement.

Neither party shall be liable for consequential, incidental, indirect, punitive, or special damages (including loss of profits, data, business or goodwill), regardless of whether such liability is based on breach of contract, tort, strict liability, breach of warranties, failure of essential purpose or otherwise, and even if advised of the likelihood of such damages. PRDOH’s recourse with respect to any liability or obligation of V2A hereunder shall be limited to the assets of V2A, and PRDOH shall have no recourse against, and shall bring no claim against, any employee of V2A.

Indemnification

PRDOH agrees to indemnify and hold V2A harmless against any losses, claims, damages or liabilities to which V2A may become subject in connection with service performed pursuant to this agreement. Furthermore, you agree to reimburse V2A for any legal or other expenses incurred by V2A in connection with investigating or defending any action, proceedings, investigation, or claim in connection therewith. However, PRDOH shall not be obligated under the foregoing indemnity agreement in respect to any loss, claim,

damage or liability resulting from the gross negligence of V2A. The reimbursement and indemnity obligations for you under this paragraph shall be in addition to any liability you may otherwise have, shall extend upon the same terms and conditions to the employees of V2A, and shall be binding upon and inure to the benefit of any of your successors, assignees, and heirs. PRDOH agrees that it will not settle, compromise or discharge any suit, claim, litigation, threatened litigation or threatened claim arising out of, based upon, or in any way related to this agreement and admitting any wrongdoing unless and until you have obtained a written agreement, approved by V2A (which shall not be unreasonably withheld) and executed by each party to such proposed settlement, compromise or discharge, releasing V2A from any and all liability.

Use of Name

PRDOH agrees to allow V2A to list its name as a firm client in its external communications. V2A will only have the right to describe the name and service line and will not disclose any information related to the nature of the work, the fees and terms, or any other detail of its relationship with PRDOH.

Non-Solicitation of Employees

PRDOH agrees not to approach, discuss, or offer employment or direct contractual services to any of V2A's employees or contractors involved in serving it, unless explicitly discussed and agreed between PRDOH and V2A.

APPENDIX 2: STATEMENT OF WORK

1. Develop survey administration, execution, and analysis plan.

Upon award our team will refine the baseline project schedule to ensure all parties have clarity on the schedule for the different phases of the project. Additionally, we will start studying in detail all information provided on Medicaid Program to Promote Interoperability of Puerto Rico (MPPIPR) and the State Medicaid HIT Plan (SMHP), as well as doing additional research in other available sources. This research will guide survey design and provide a clear understanding of the expectations for the final report.

2. Define/refine survey target groups and percentages for statistical validity.

Based on the context acquired and our knowledge and data of the local healthcare environment, a refinement of the sample will be performed to ensure adequate representation of the different characteristics among providers and care settings. We will pursue statistical rigor as much as possible, however we may select some participants via purposive sampling, where researchers use their expertise to select a sample that is most useful to the purposes of the research, as needed to achieve a sufficient coverage or participant types and classes.

3. Develop survey questions and final survey tools in English and Spanish, conduct survey testing.

We will design and program up to 4 questionnaires variants, which will allow for 2 Spanish and English versions. Our intention will be to achieve an instrument capable of capturing the relevant information from the different types of providers, care setting and participants. The questions will be defined based on the guidance from the provided material, the RFP and our experience.

4. Develop survey methodology and outreach.

The survey will be administered through a link in an online format, ensuring convenient access for participants. If the desired sample size is not achieved and for those who are not reachable, we will complement email or text delivery with personal phone calls or in-person visits, if feasible, to ensure a higher response rate and data completeness.

We are allocating 6 months for recruitment and execution of fieldwork and expect this will be a viable timeframe. Healthcare professionals have demanding schedules, and the critical nature of their work presents a significant limit to their availability to engage in research initiatives.

5. Administer the survey using multiple methods.

As stated above, our primary method to administer the survey will be online format, to ensure a convenient access for participants, however this will be complemented with personal phone calls or in-person visits, if feasible, to ensure a higher response rate and data completeness.

Our proposed team structure contemplates an engagement manager as well as Quantitative Market Research Lead, who will be responsible for direct supervision and quality control of the survey responses and administration progress.

6. Compile and analyze survey responses.

We will apply automated methods to compile the responses during the fieldwork phase and allow for easier and standardized manipulation of the data. We will be performing data quality validations to the information coming from the fieldwork, in addition to the checks and quality controls performed as part of the fieldwork per se. After the required data quality, we will implement data cleaning and transformations methods to ensure the information is ready to perform analyses and to be loaded into the selected visualization tool.

Our team is well versed in data analysis and has ample experience analyzing healthcare data, performing statistical and geographical analyses. As we progress in the

analysis constant communication and findings sharing with the PRDOH project team will be instrumental in ensuring clarity and alignment.

7. Develop charts, graphs, summarize findings and write up process for the final report.

As part of the analysis charts, graphs and other visuals will be developed to help in the extraction of insights and to illustrate findings. The main findings complemented with visuals, recommended actions to address the identified challenges and barriers to EHR adoption and interoperability and all pertinent details from the survey process and methodology will be put together in a final report and presentation.

APPENDIX 3: CASE STUDIES

Case Study #1: Understanding the healthcare industry in Puerto Rico

The Challenge

After the acquisition of a local health insurance company, a Mutual Holding Corporation needed to understand the current state and nuances of the healthcare industry in Puerto Rico, including adoption of digital platforms to guide its strategic decisions.

The Approach

A market research study was developed to understand the Puerto Rico healthcare landscape on a regional and island level, and the contracting dynamics of key healthcare providers such as Primary Care Physicians and Medical groups, specialists, clinics, hospitals and other ancillary.

The Solution

Deliverables of this study included a complete deck with the findings and recommendations, a database with all the information gathered and a Tableau dashboard with key interactive visualizations. Figure 9 shows some snapshots of the dashboard.

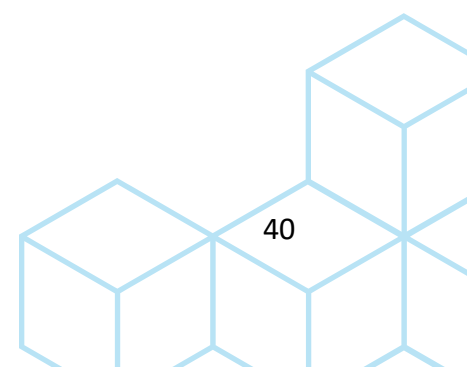
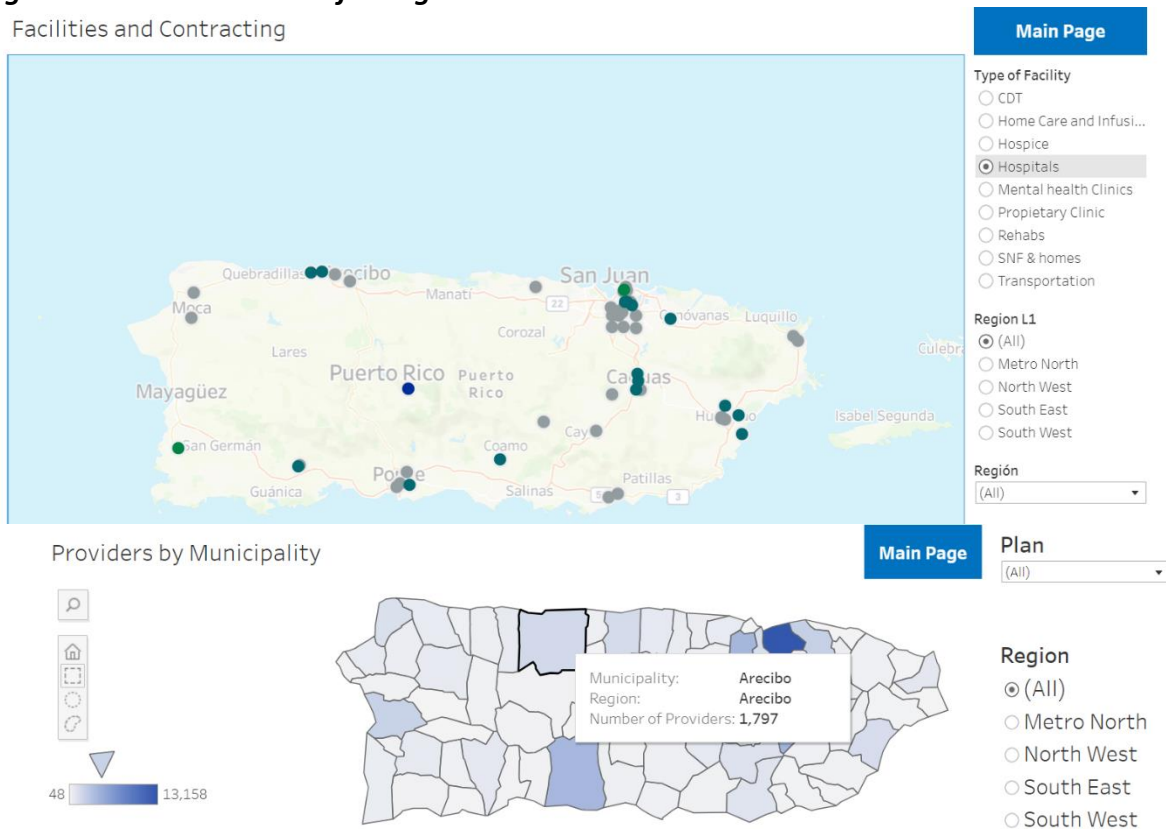


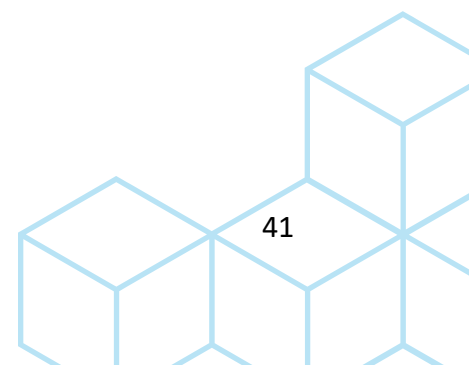
Figure 9: Market Research findings interactive dashboard

Facilities and Contracting



The Results

The customer now has a current state study to inform executive strategic decision-making process, including clear executive level insights of key strengths, weaknesses, and opportunities for the incumbents in the health insurance sector in Puerto Rico, an interactive dashboard to explore different angles of the information according to its strategic initiatives and a baseline to measure the progress of the market.



Case Study #2: Steering the healthcare innovation journey

The Challenge

The customer, Abarca Health, a pharmacy benefit manager and healthcare technology company, was in the process of developing an innovative healthcare solution and required deep understanding of its stakeholders to design a solution that satisfied their needs, pain points, and preferences.

The Approach

The project consisted in conducting all the Research necessary to understand stakeholders' needs and barriers, design the desired solution and gather the feedback from stakeholders to refine the 4 high-level concepts. The stakeholders included Stakeholders involved: PBM Leaders, Md's, Office Administrators, Pharmacists, Patients and Caregivers.

The Solution

Innovation in healthcare is often a complex and ambiguous process, especially when it involves transforming traditional practices. To address this, the research process included the following activities:

- 24 One on one interviews with Md's and Office Administrators, Pharmacists and PBM leaders
- 8 Focus Groups with Patients and Caregivers
- 200 reactions from Pharmacists, Md's, Office Administrators, Patients and Caregivers for the 4 Concepts developed (video and storyboard concept-tests)
- 10 Facilitations with diverse stakeholders to address the barriers and challenges found in the research, co-design a user centric solution & problem-solve how to implement the desired system.

The Results

The research methodically steered the innovation journey, grappling with the complexity and uncertainties inherent in healthcare innovation. It guaranteed that the individuals crafting the solution were well-informed, leading to the creation of a user-friendly product

that catered to the requirements of all stakeholders. This, in turn, paved the way for the successful adoption of the program and enhanced patient care and caregiver's lives.

By conducting thorough research and engaging with various stakeholders, the approach ensured a deep understanding of their needs, pain points, and preferences. We identified early within the process the barriers we would encounter, including the reluctance of some MDs to use e-prescriptions, as well as opportunities Rx Delivery would entail for caregivers. These barriers and opportunities were then leveraged in the solution design. The data driven and iterative nature of the methodology allowed the team to choose, improve and address implementation issues as they rouse.

APPENDIX 4: ORGANIZATIONAL CHART

V2A is led by 6 Directors each focused on a professional practice or industry. Under each Director's supervision can be one or many Engagement Teams, depending on the active engagements. As can be seen in the chart below, some of the Directors also supervise functional teams of the firm such as Finances & Administration, IT Infrastructure and Marketing.

Engagement Teams are assembled depending on the project requirements and will typically have 1 Engagement Manager and 2 consultants. Additionally, Senior Engagement Managers may assist the Director in supervising these teams. Our current consulting staff is the following:

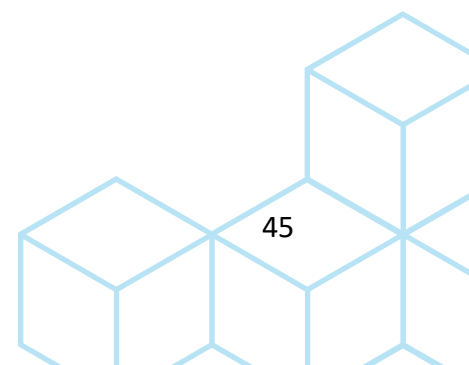
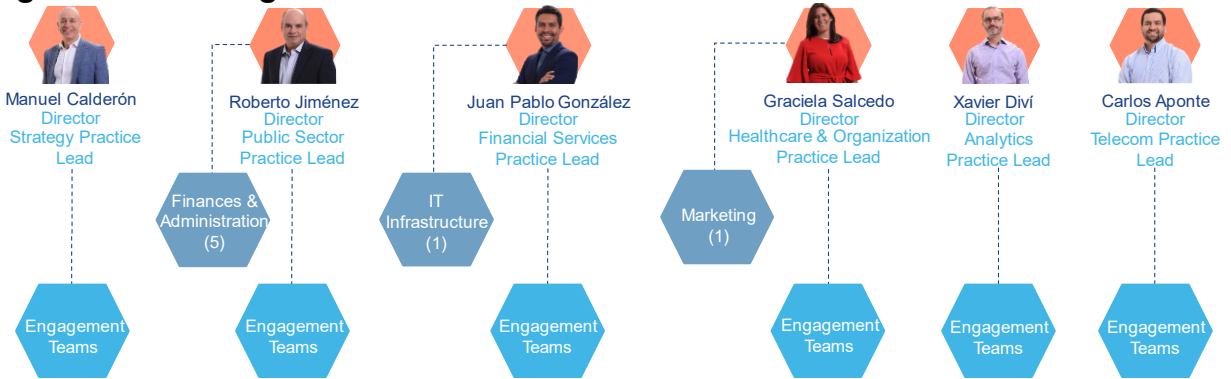
- Senior Engagement Manager – 2
- Engagement Manager – 11
- Senior Associates – 10
- Associate – 16
- Business Analyst – 13

The Analytics Practice has a dedicated team of technical consultants, that may work full time in analytics projects or collaborate in engagement teams with analytics components in a full or partial time basis, working on the required analytics workstreams. The analytics consultants are supervised by our Analytics Manager and under the leadership of the Practice Lead and Director Xavier Diví. Our Analytics Practice staff is the following:

- Analytics Manager – 1
- Senior Data Scientists – 1
- Data Scientists – 3

- Data Engineer – 2
- Data Analysts – 1

Figure 10: V2A Organizational Chart



**APPENDIX 5: QUALIFICATIONS
OF KEY PERSONNEL**

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Graciela Salcedo Canto

DIRECTOR

Overview

Managing Director with more than 20 years of experience in a wide range of areas of brand management, project management, process improvement and strategic planning.

Skills/Certifications

- Fluent in Spanish and English, proficient in French
- Certified Scrum Product Owner
- President of the Board of Directors of Juan Domingo en Acción, a non-profit community organization
- Penn Interviewing Member

Professional Experience

V2A Consulting | 2006 – present

Director, San Juan, PR

- Leads the firm's Health Care practice. Led a five-year relationship with the leading managed care organization in Puerto Rico. Specifically, led the creation of a strategic PMO for the company and oversaw the implementation progress of all initiatives.
- Extensive experience leading strategic planning processes for multiple clients in the banking, insurance, retail, CPG and non-profit sectors, including: the largest Medicare Advantage, health, life, property and casualty insurance conglomerate in PR with \$2.4 billion in revenue; a local food distributor with 100 years of history and \$290 million in revenue; the main importer and distributor of sugar in PR with more than \$115M in revenue; a Venezuelan multinational bank entering the public relations market; and a retail business with design, sales and export operations in PR and Venezuela with more than \$50 million in revenue.
- Led a team to facilitate a digital transformation journey within the Operations division at the largest bank in Puerto Rico, including mapping operational processes, integrating various departments, and facilitating a cultural transformation.
- Led a client reengineering team to identify close to \$4M in process efficiency opportunities from the implementation of a common lending platform in commercial and consumer credit operations of the main bank in Puerto Rico (more than \$35 million in assets).
- Led a team of five consultants to carry out an in-depth diagnosis of several government agencies with a budget of \$394 million under the Secretariat of Economic Development that led to multiple efficiency improvement measures and an organizational restructuring recommendation.
- Developed a profit improvement program for a local mortgage bank and retail bank, including branch performance monitoring systems, cost reduction and productivity improvement recommendations, process documentation, and strategic communications.

Other experiences

Procter & Gamble | 1999-2006

Brand Manager, San Juan, PR

Xerox Corporation | 1994-1999

Technical Program Manager, Rochester, NY

Education

2019 | Harvard Business School

Leading Professional Services Firms; Cambridge, MA

1998 | Rochester Institute of Technology

Master of Engineering in Industrial Engineering; Rochester, NY

1994 | University of Pennsylvania

BS in Mechanical Engineering; Philadelphia, PA



Xavier Diví
DIRECTOR

Overview

Xavier Diví has more than 15 years of experience in various financial and economic development areas. Xavier currently manages most of the content development for our knowledge-sharing publications.

Certifications / Skills

- Experience in managing investment optimization processes in structured corporate environments and in the development of analytical tools to improve financial decision making.
- Native of Spain. Fluent in Spanish, Catalan and English.
- Financial management
- Strategic planning
- Investment Optimization
- Business Analysis

Professional Experience

V2A Consulting | 2010 – present

Senior Engagement Manager, San Juan, PR

- Managed, with the largest bank in Puerto Rico (46% share in deposits, \$29B in assets), to calculate the profitability of the banks' clients through the lines of business (mortgages, automobiles, credit cards, personal loans, commercial, deposits, insurance and securities). Developed a set of "quick win" initiatives and long-term strategic initiatives based on customer outcomes and findings along with product profitability.
- Worked on a project for the same bank to increase the productivity of the commercial credit unit by redesigning its loan origination processes and managed the redesign of the bank's commercial and construction appraisal application and review processes.
- Led the development of a three-year financial plan for a Dominican Republic bank to increase its single-digit ROE to the 25%-30% range and position it among the five local banks with the highest total assets.
- Worked on the design and implementation of a restructuring plan in three government agencies in Puerto Rico to maintain basic public services with a 30% reduction in the workforce. Expected reengineering savings to be included in the budget process of the Commonwealth of Puerto Rico.
- Created quarterly reports of the banking industry in Puerto Rico and the Dominican Republic. These reports include analyses of profitability, asset quality, and, capital adequacy and productivity. Supervised quarterly updates of reports.

American Express Travel Related Services Inc. | 2007-2009

Director/Chief Financial Officer for Puerto Rico and the Caribbean, San Juan, PR

- Led budgeting, forecasting, investment optimization and strategic planning for the establishment and consumer card services markets in Puerto Rico and the Caribbean, which generated \$5.3 billion in billed business; \$255 million in RA; \$115 million in revenue; and \$22 million in net income.
- Promotion of investment reduction process to achieve financial objectives.
- Updated the International Chief Financial Officer's team on the month-end results for Puerto Rico and the Caribbean, as well as on the risks and opportunities to achieve the plan and planned objectives.
- Built business cases to gain additional resources and take advantage of new growth opportunities.

Education

1999 | Escuela Superior de Administración y Dirección de Empresas (ESADE)
BS in Business Administration and Master of Business Administration, concentration in Finance, Barcelona, Spain



Coral Frederique

ENGAGEMENT MANAGER

Overview

Engagement manager and experienced finance professional with a demonstrated history of working in the management consulting industry. Skilled in **healthcare, pharmacy benefit management, rebates, underwriting, government debt restructuring, and financial modeling**. Strong business development professional with a bachelor's focused in **Accounting and Finance** from the University of Puerto Rico.

Certifications/ Skills

- Strong at networking, and building/managing relationships.
- Proficient in project management, financial modeling, and strategic planning.

Professional Experience

V2A Consulting | 2022– present

Engagement Manager, San Juan, PR

- Support multiple engagements, and business development efforts as well as facilitate client relations in the healthcare, public, and consumer goods sectors.
- Collaborate as one of the firm's leaders in the Healthcare practice in the creation and publication of content and insights.
- Spearheaded the development of comprehensive financial modeling as well as facilitate the strategic business strategic planning for a leading food manufacturer and consumer distribution company in Puerto Rico.
- Established a comprehensive PMO framework and provided project management support to a top local MCO to ensure the successful completion of the Vital proposal.
- Headed a team of 2 in the development of an economic development strategic plan for the Puerto Rico Economic Development Department

Abarca Health V2A | 2018– 2022

Senior Manager, Rebate Operations and Underwriting, San Juan, PR

- Led the fast development and establishment of a new division within the organization that had over \$800M in incremental annual rebates under management and brought over \$50M in incremental revenue to the organization in 2021.
- Oversaw a team of 5 direct reports in the ongoing operations for rebate aggregation services, which included 3 main areas: 1) client account management, 2) formulary management, and 3) rebate billing operations.
- Headed the design, release, evaluation, negotiation, selection, and contract execution of the organization's RFP to pick our rebate aggregation partner through a competitive bid process.
- Co-Designed, pitched and eventually piloted and implemented with one of the biggest health plan clients a new financial model branded as Assura™ to share risk in the problem of drug pricing variability and inflation.

Other experiences

Puerto Rico Fiscal Agency And Financial Advisory Authority (AAFAF) | 2017-2018

Associate of Financial Restructuring, San Juan, PR

V2A Consulting | 2015-2017

Analyst and Associate, San Juan, PR

Education

2010-2014 | University of Puerto Rico, Río Piedras Campus
BS – Business Administration, Finance and Accounting



Jose Pablo Perez

ANALYTICS MANAGER

Overview

Jose Pablo is an Analytics manager at V2A. He has had experience in the financial services and healthcare sectors. In financial services, he has been involved in Lean transformations, profit improvement and client clustering/segmentation projects. Within healthcare, he has experience in strategic, operations and organizational driven projects.

Certifications/ Skills

- Process Optimization
- Organizational Development
- Lean Methodology
- Market research and Intelligence
- Financial Analysis

Professional Experience

V2A Consulting | 2017– present

Analytics Manager, San Juan, PR

- Managed a project to standardize Puerto Rican addresses, geolocate them, and determine coverage of these locations within a Puerto Rican telecom provider.
- Performed a client profitability analysis and segmentation of a leading Dominican banking institution to improve cross-selling among highly profitable clients and enhanced the institution's reporting tools to provide better visibility and performance management.
- Planned the strategic project in one of Puerto Rico's biggest health insurance providers that led to an increase of 16% in membership of one line of business.
- Developed a framework to segment and analyze Puerto Rico by micro-markets to optimize the branch network of one of its financial institutions. The use of this framework led to estimated savings of \$20MM.
- Diagnosed, designed, and implemented the LEAN transformation of the Loss Mitigation Department of one of Puerto Rico's financial institutions, which reduced lead times by 70%, increased service level by 200%, reduced quarterly regulatory findings by 100%, and led to savings of \$1MM.
- Implemented the LEAN transformation of the Dealer Services Division and Underwriting Division of an auto financier, which increased collections efficiency by 20% and increased risk visibility in the Dealer Services Division; and reduced lead times by 40%, increased service level by 25%, and generated savings of \$700K in the Underwriting Division.

Other experience

E3 Consulting | 2016-2017

Manager, San Juan, PR

- Managed the business process documentation, redesign, and improvement of one of Puerto Rico's leading transportation services.
- Managed the assessment of the implementation of a data warehouse in one of Puerto Rico's biggest health insurance providers.

Education

2021 | Quantic School of Business and Technology
Masters of Business Administration

2011 | Massachusetts Institute of Technology
Masters of Nuclear Science and Engineering; Cambridge, MA

2010 | Massachusetts Institute of Technology
Bachelors; Cambridge, MA



Elvis Torres

DATA ENGINEER

Overview

Data Engineer with several years of experience with ETL processes, data analysis and visualizations. Experienced with coding languages and structured data applications.

Certifications/ Skills

- Data visualization and dashboard creation in Power BI, Tableau and SAP Analytics Cloud
- ETL process in Python
- Experienced with structured database applications: MySQL, Impala
- Data Visualization with Tableau Certification

Professional Experience

V2A Consulting | 2022– present

Data Engineer (2023 – present), San Juan, PR

- Developed scalable ETL processes for creating and maintaining databases for dashboards.
- Performed data analysis to support business decisions and identify trends in client's data sets.

Data Analyst (2022-2023), San Juan, PR

- Supported existing firm dashboards in the economy and healthcare sector using Power BI.
- Created an ETL process and created a Social Determinants of Health dashboard in Tableau.
- Data analysis and visualization for clients using Power BI and SAP Analytics Cloud.

University of Puerto Rico | 2019– 2022

Scientific Instrumentation Specialist, San Juan, PR

- Responsible for the proper functioning and data quality of several real-time measuring equipment.
- In charge of field sampling stations.
- Performed chemical analysis of air particles, rain and cloud water samples.
- Handled and analyzed data for scientific publications.
- Presented research findings and prepared scientific manuscripts for publication.
- Developed Python codes to monitor equipment's performance, store and visualize data.
- Supervised undergraduate and graduate students.

Education

2020 | University of Puerto Rico, Río Piedras Campus

PhD – Environmental Science

2013 | University of Puerto Rico, Río Piedras Campus

BS - Chemistry



Alexandra Suárez Carlo

Alexandra Suárez Carlo is the Founder of Lateral Strategy. She graduated from Cornell University and pursued an MBA with a concentration on Consumer Behavior from ESADE University in Barcelona.

With over 20 years of experience in Market Research and Brand Strategy, Alexandra has developed a unique research philosophy: tackle every project with the intention to uncover insights that lead to innovation, always seeking to understand the HUMAN behind the client or consumer. A strategist at heart, Alexandra dissects issues from various angles to unearth actionable insights.

Alexandra has used research techniques to uncover insights and facilitate innovation development for Fortune 500 companies. In Puerto Rico, she has specialized in insight hunting for the healthcare industry, helping a variety of customers develop solutions for patients. Some of her customers include payors Triple S, MMM, and Abarca, pharmacy networks like Alivia Health, pharmaceutical companies like Bristol Myers Squibb, hospitals Auxilio Mutuo and Hospital La Concepción, and the American Kidney Fund patient organization.

Alexandra is certified to teach innovation frameworks including Creative Problem Solving, Design Thinking and Synectics.

When not working, she spends most of her time educating others (from teachers to her two kids) on the power of growth and creative mindsets.

On a personal level, she describes herself as an optimist who believes creativity can change the world.

LATERAL  STRATEGY



Natacha Suárez Carlo

Natacha Suárez Carlo is a top business leader with over 25 years of experience in the areas of Strategic Planning & Operations, Sales & Marketing, Marketing Research and Analytics, Business Improvement, and People Management and Development within the Bio-Pharmaceutical and Healthcare Industry.

As an expert planner, Natacha has directed Strategic and Operating Planning Processes, aligning product plans and operational processes, conducting capability and capacity assessments, and allocating company resources to efficiently support people, product and patient strategies.

Some notable projects managed by Natacha have been:

- Stakeholder mapping Puerto Rico's dynamic payor system for the Puerto Rico Pharmaceutical Industry Association (PIA)
- Developing insight-based-strategies to increase vaccination rates among adults in the United States and Puerto Rico, in collaboration with the Centers for Disease Control
- Conducting market and forecasts for multiple product launches in therapeutic areas such as: hematology-oncology, respiratory, rheumatology, gastroenterology, endocrine, dermatology, and transplant disease states.
- Implementing workforce engagement surveys to increase job satisfaction and retention among various organizations, as well as developing plans to address engagement opportunities.

Most recently, Natacha transformed Puerto Rico's largest specialty pharmacy to leadership position by developing state of the art clinical programs, negotiating key payor contracts, and right sizing and developing its workforce.

She now works with Lateral Strategy as its main Business Partner, focusing on healthcare projects.

Natacha lives in San Juan with her husband and two teenage children. She enjoys running, hiking, and sailing, and is an avid reader of fiction in her spare time.





Marie Quintero

Marie Quintero is a seasoned marketing research professional with a proven track record in managing and executing qualitative and quantitative research projects.

Marie is also an expert in the healthcare industry. She is the main research provider for multinational biopharmaceutical companies based in Puerto Rico and Latin America. She has successfully designed and implemented research initiatives involving stakeholders such as physicians, healthcare providers, payers, and patients. She is experienced in leading complex marketing research engagements and projects.

She has also collaborated with large human resources research companies, optimizing questionnaire design and data processing using customized tools.

Marie founded MQA MARKET RESEARCH INC. a Miami-based full-service marketing research operation, servicing Latin America, the Caribbean, and U.S. markets. She extensively collaborates with Puerto Rico-based research companies to maintain high client satisfaction and quality standards.

Marie brings extensive knowledge, strategic insights, and a customer-centric approach to research.

Marie has received various honors and awards throughout her career, including being distinguished among the Women Who Lead in 2011 by Caribbean Business and receiving the KMR Employee of the Year Award global recognition (2006)



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