

**TOWN OF TRUMBULL
NOTICE OF SPECIAL MEETING
BOARD OF FINANCE**

DATE: July 24, 2012
TIME: 7:00 p.m.
PLACE: Council Chambers

AGENDA

CALL TO ORDER

PLEDGE OF ALLEGIANCE

FISCAL YEAR 2012-13 SUPPLEMENTAL APPROPRIATION

07-12-06	Barbara Crandall EMS	FROM:	Fund Balance	\$28,050
		TO:	01022600-522202 Professional Services	\$28,050
			Assessment of Town EMS System	

ADJOURNMENT

TOWN OF TRUMBULL
BOARD OF FINANCE

REQUEST FOR ACTION

DATE: July 24 2012
AGENDA: 7-12-06
AMOUNT: \$28,050.00

2011-2012

(A) APPROPRIATION

FROM: ACCOUNT NO.
ACCOUNT NAME Fund Balance 28,050.00

TO: ACCOUNT NO. 01022600-522202
ACCOUNT NAME Professional Services 28,050.00

(B) TRANSFER

FROM: ACCOUNT NO.
ACCOUNT NAME

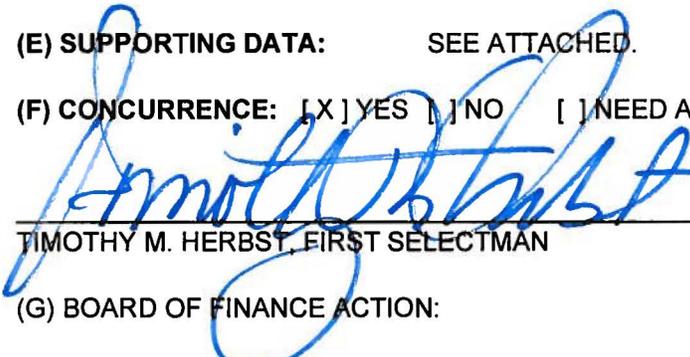
TO: ACCOUNT NO.
ACCOUNT NAME

(C) SUMMARY OF REQUEST: Assessment of Town EMS System

(D) REQUESTED BY: Barbara Crandall, EMS Chief

(E) SUPPORTING DATA: SEE ATTACHED.

(F) CONCURRENCE: YES NO NEED ADD'L INFORMATION


TIMOTHY M. HERBST, FIRST SELECTMAN

(G) BOARD OF FINANCE ACTION:

1. APPROVED
2. RECOMMENDED TO TOWN COUNCIL
3. TABLED
4. DENIED
5. OTHER

**Town of Trumbull, Connecticut
Request for Proposal (RFP)
Assessment of Town EMS**

RFP #5927 DUE: May 9, 2012 Noon / 3:00pm

RESPONDER'S INFORMATION & SIGNATORY FORM



The Holdsworth Group, LLC
Holdsworth Pelton & Associates, Inc.
269 Main Street
Cromwell, CT 06416
860.638.1800 Fax: 860.638.1801

www.Holdsworth.com

Number of years in business:

- Holdsworth Pelton & Associates, Inc 24 years CT # 0290679
- The Holdsworth Group, LLC 2 years CT# 1005387
 - Created in 2010 to separate consulting & billing service groups.

Contact for this RFP

Bob Holdsworth, President
bob@holdsworth.com

The Holdsworth Group, LLC
269 Main Street
Cromwell, CT 06416

May 9, 2012

A handwritten signature in black ink, appearing to read "R. Holdsworth", written over a horizontal line. Below the line, the text "by (Signature)" is printed.

by (Signature)

Robert L. Holdsworth
President
860.638.1800 fax: 860.638.1801



Proposal for an Assessment of the
Town EMS System

presented to

Town of Trumbull, Connecticut

by

The Holdsworth Group
269 Main Street
Cromwell, CT 06416
860.638.1800

www.Holdsworth.com

May 9, 2012



Improving the health of your EMS system. sm

May 9, 2012

Robert J. Chimini, Purchasing Agent
RFP Review Committee Members
Town of Trumbull
5866 Main Street
Trumbull, CT 06611

RE: RFP # 5927 Assessment of Town EMS

Dear Mr. Chimini and RFP Review Committee Members,

Thank you for the opportunity to present this proposal to you. Managing an EMS system is getting tougher everyday, decisions about operations, structure and change are difficult and, if not done right, costly. Bringing in an objective outsider to take an unbiased look at how you are currently doing things, with an eye on the future, is an invaluable tool.

Our consulting engagements result in recommendations that provide greater service, improved operating efficiencies, a higher level of satisfaction in the communities served and sound economic strategies that result in positive cash flow. We look forward to assisting you in conducting this assessment. We have successfully handled similar projects in the past.

March of this year marked our 24th anniversary in business. We have grown dramatically in the past several years due largely in part to the hundreds of satisfied municipal, volunteer and non-profit agencies just like yours that use our services. We have worked directly with, or provided products to, agencies in 42 states, Canada, the UK, Australia and the Netherlands. In fact, this growth led us to separate the functions of our business into two companies in 2010.

The Holdsworth Group now handles the consulting, marketing and management projects and the original firm, and our sister company, Holdsworth, Pelton & Associates is the 2nd largest submitter of ambulance claims in Connecticut, representing over 32% of the services in the state. That company provides strictly ambulance, fire and paramedic billing services.

Together, we offer services in these areas:

Management/Strategic Planning: EMS system evaluations, operations audits, contract negotiation assistance, customer service, leadership recruiting, business coaching as well as real-world, effective classroom leadership and teambuilding training programs. We have provided assistance to more than 6,300 leaders representing more than 820 separate clients.

Funding & Reimbursement: evaluation of the funding mechanisms in place, assessment of payer mix, training on billing and collection practices as well as bill processing services for agencies in CT and MD (currently). We also developed and operate the first national insurance HIPAA compliant, data collection site designed specifically for the ambulance industry, **www.AmbulanceBill.com**



Marketing: We offer complete marketing solutions including public relations, media management, governmental agency education, website design and social media integration. In addition a full range of agency marketing plans, strategies and brochures can be created to accomplish and marketing need. **Download our complimentary report:**



Survival Marketing: 52 Ridiculously Effective Ways to Market Your EMS Service or Fire Department

Go to: **www.Holdsworth.com** and look for the link.

Each member of our consulting staff is **REQUIRED** to remain active in their field of expertise. **ALL** of our EMS/Fire/Communications consultants all continue to work duty shifts with a wide variety of services. It is this level of experience and commitment to the emergency service field that our clients tell us sets us apart. Our advice comes from current, up to date knowledge, not an outdated been-behind-the-desk-for-years perspective.

As the lead consultant for your project, I should tell you briefly about my background. I was the General Manager for one of two ambulance services serving the City of Hartford, Connecticut. That service responded to more than 25,000 requests for service annually and during my tenure, we grew the company more than 418% and initiated ALS-Paramedic level service in the capital city for the first time.

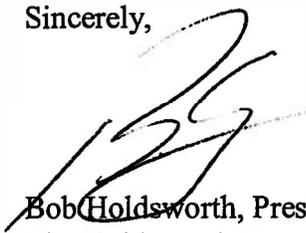
I then served as the EMS Coordinator at Lawrence & Memorial Hospital, which has Connecticut's second busiest emergency department. I founded and then supervised the regional ALS program that covers more than 11 municipalities. This experience, and the work that we have done with agencies all across the country improving ambulance services and building or strengthening ALS services, helps me to understand the operational issues facing your agency as you ponder your future in these changing times.

I was also part of the resource team that crafted the legislation in 1996 that created and legalized the 'Bundle Billing' process which allows ALS agencies to work out agreements with their BLS services to get paid by Medicare for services.

Thanks again for allowing us to present The Holdsworth Group to you. We will be available for interviews either in person or via conference call to answer any questions that you or any of your colleagues might have.

We look forward to your selection and to working with you. If you have any questions please call the office toll-free at 1-800-437-8347.

Sincerely,



Bob Holdsworth, President
The Holdsworth Group, LLC

FEIN# 27-2660719

voice: 860.638.1800
fax: 860.638.1801
email: bob@holdsworth.com
web site: www.Holdsworth.com

Project Scope

Focused review of the current system

We understand that we are being retained to conduct an independent review of the operation of the Trumbull Emergency Medical Services as well as the other participants in the EMS system. We are specifically evaluating the structure, staffing and business operations practices with a view towards efficient and effective service delivery. You are particularly interested in seeing a review of organizational structures, level of service, staffing, benefits, funding sources, call volumes and overall cost effectiveness.

As we discussed, I recommend a focused study to identify the capabilities of the current system and the issues facing them. It is important that any recommendations be made with a working knowledge of the existing situations as well as an assessment of future needs.

We will need to meet (phone or in person) with specific Town officials, representatives of each response agencies, the State of Connecticut Department of Public Health and legal counsel if applicable.

The report will address the following areas:

1) Staffing Levels

We will present a series of options to deal with the staffing of the EMS units. We will examine the following options: staffing levels, pay policies, benefit policies, job descriptions and retention.

2) Number of units

We will look at the current call volume, the source of those calls and the current vehicle deployment patterns. Adjustments and recommendations in deployment will be made if necessary.

3) Management of EMS

We will recommend any adjustments to the management structure of your EMS system. We will develop written guidelines for management to supplement the recommendations that we make. Job descriptions will be provided for any positions that are recommended.

4) System Operations

An evaluation of the current vendors and system partners will be completed. We will then make recommendations for maintaining relationships or restructuring them. This includes the potential need to separate and conduct individual RFPs for various portions of the operation.

5) Potential Growth Areas

Our report will include a discussion of growth opportunities and new markets that exist in the area and an analysis of cost / benefit issues. We will examine the service area and attempt to help determine the most effective course of action in either expanding strictly to cover your Primary Service Area (PSA) or to assume greater responsibility in the region through strategic alliances or acquisitions.

6) Facilities

We will evaluate the need and the availability of possible additional stations, their locations as well as the number of vehicles and/or system status posting locations (especially during daytime coverage).

7) Call Analysis

We will evaluate all available data from the communications center, internal reports and the interview process to add subjective perspective to the hard data. We look at all three of these as important because people's perceptions are as important as the hard objective data. We will expect access to communications center records and we will require the timely generation of statistical reports. Our normal procedure is to evaluate the current and the previous two years worth of data to look for trends.

8) Funding

In order for us to establish the true and full picture of the cost operating EMS, we will need copies of the budgets for the current and previous two fiscal years. We can then evaluate the current needs, growth needs and the sources and amounts of revenue. Tax subsidies, fund raising, and grant programs will all be explored.

Billing is most likely the primary revenue source. An analysis of the billing system that is now in place will be conducted and a revenue projection for the upcoming year will be included. We will quantify your payer mix as well as the collection rate over the last three years.

9) Recommendations

We will prepare an action plan / timetable (the foundation for your business plan) to accomplish the recommended course(s) of action. We will also be available to you via phone, email, fax and courier after the presentation of the final report to help guide the implementation, for a period of 60 days.

Access to Premises

For all agencies involved in the EMS system, we will expect access to:

- | | |
|------------------------|---|
| business records | financial records (budgets, grants, fundraising, billing) |
| response statistics | policies & procedures |
| insurance certificates | members of the administration of all agencies |

In addition, we will be looking for all municipal budget information for any revenue or expenses related to the EMS system.

This may prove not to be an all-inclusive list as we move forward in the process. Basically, we will expect full and complete access and cooperation.

All information disclosed to us or prepared will remain strictly confidential.

However, we cannot guarantee the confidentiality of the final report once it is delivered to you.

Amendments-Changes in Scope

We agree that no changes in project scope or contract language will be made without additional written agreement. Upon notification of acceptance of this proposal, we will send two copies of a contract to you for execution.

Project Team

All of the folks working on your project will be our staff. To help keep your costs lower, we employ a wide range of qualified independent experts on an as needed basis, but the work is done completely under our supervision from start to finish.

Team Leader: BOB HOLDSWORTH

Bob has been leading customer-focused organizations for more than 36 years, 33 of those in EMS. In each position, he has had the responsibility for team member orientation and education as well as motivating folks to provide high levels of customer service in demanding, fast-paced, people-focused environments.

His diverse background includes serving as a manager for two national food service corporations, an officer and trainer for the Connecticut Department of Corrections and the General Manager for a large private ambulance service that experienced profitable 418% growth in a four year period.

Bob also held the position of Emergency Medical Services Coordinator at one of Connecticut's busiest hospital Emergency Departments. His responsibilities included developing relationships and providing customer service to more than 35 area agencies and the implementation of a regional paramedic response service providing care to 11 municipalities. This unique service integrates both paid and volunteer staff and has been model for many agencies around the country.

In the past 24 years, he and his partners have worked closely with more than 820 organizations and trained more than 6,300 folks in the fine art of leadership, teambuilding, client service, marketing and operational improvement.

In 1988, he founded Holdsworth & Associates, Inc. a consulting and medical billing practice that has grown 748% since 1994 with 93% client retention. In 2010, he split off the consulting only practice under The Holdsworth Group, LLC. As a Business Coach, Bob has had the privilege to work with a wide variety of organizations spanning 48 different industries all across the country and internationally.

Bob is a nationally recognized speaker, author and has been honored as a biographee in *Who's Who in Healthcare* and *Who's Who in the World*.

Consultant Responsibility

1. If required, we will provide a full and open presentation to the Boards of Selectmen and/or Finance as well as to the TEMS Board & membership. At each meeting, we will allow for a question and answer session.
2. The 'not to exceed' sum and payment terms can be found in the 'Pricing Proposal' section of this response.
3. We will provide you (10) bound copies of the final report.

We have NO known conflicts of interest with any agencies, companies or persons involved in this project.

Benchmark Dates:

We can currently offer you the following project dates:

Late May	Notification of award received by us
Start Date: (options)	Week of June 12 th or June 26 th
Draft report	Draft report presented to the Board - week of September 10th
Board presentation	On-site presentation to the Boards and the report presented in final written form week of September 17 th .
1 week after presentation	Work/planning session to begin implementation plans.

The interview process will require the coordination of schedules to facilitate all interviews being completed as quickly as possible. Evening hours can be utilized if necessary.

We will send a list of 'information to have available' to each interviewee prior to the meeting.

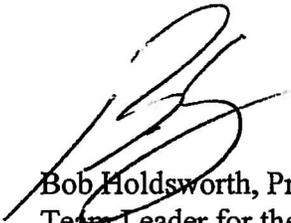
RETURN ON INVESTMENT

When we have completed this project you will have:

- a clear vision for the future,
- a system that is efficient and effective
- projections of EMS costs for Town and internal budgeting needs
- recommendations for a strong organizational structure, which may include additional positions
- improved by-laws and SOPs
- stronger HR program (job descriptions, benefit plans, etc.)
- feasible methods to develop and finance the growth of the EMS system
- a complete assessment of market and growth potential opportunities
- ~~specific strategies to staff the organization at the ALS level~~
- a prioritized action plan to accomplish your goals,
- the foundation for a business plan for the stability and growth of the EMS System

Our entire team looks forward to working with you on this project !

Respectfully submitted,



Bob Holdsworth, President
Team Leader for the
Town of Trumbull EMS System Assessment Project.

Attachment A Partial Reference List

L & M Hospital Paramedics, CT System design, operations, billing	Ron Kersey	860-444-5164
Town of Southbury, CT EMS System evaluation/ paramedic service	Bill Davis Jennifer Naylor	203.262.0600 x 254
K-B Ambulance Corps, Inc., CT Agency evaluation for upgrade to paramedic service	Randy Daggett	860.774.7625
Town of Cheshire, CT EMS system evaluation, paramedic contract negotiation	Mike Milone	203.271.6660
Northeastern Connecticut Council of Governments Evaluation of the regional EMS system needs leading to an RFP and contract for regional paramedic service	John Filchak	860.774.1253
Town of North Branford, CT Evaluation of staffing need, response issues, budget and strategic planning leading to a contract for staffing services.	Anthony Esposito	203-484-6002
Wetzel County Emergency Ambulance Authority, WV County system evaluation, redesign, fiscal planning	Jim Colvin	304-451-2314
Lauderdale County/ Metro Ambulance Service, MS County system evaluation, redesign, fiscal restructure	Clayton Cobbler	601-485-2958
Hunt Memorial Hospital District, TX County system evaluation, restructure of system, RFP creation and RFP selection process	Richard Carter	903-408-1600
Colorado Health Department, EMS Division Rural manager curriculum development, reimbursement seminars, recruiting and retention program research and design.	Mike Armacost	303-692-2982
City of Trenton EMS, NJ System audit, strategic plan, EMS Director selection, reimbursement system restructure	Rich Snyder	609-989-4041
Town of Mamaroneck, NY Assisted in establishing EMS Authority, billing	Ed McCormack (retired)	914-381-7838

Aetna Ambulance Service, CT
Interim management, contract negotiation, marketing

Jean Grady
(deceased)

860-249-2079

Golden Cross Ambulance, NH
Safety management, contract negotiation,
operations issues

Richard Brown 603-442-6660

Linden EMS, NJ
System review, analysis and recommendations

Tom Angelo

732-381-8887 x16

**TOWN OF TRUMBULL
RFP 5927 - REQUEST FOR PROPOSAL
EMS ASSESSMENT
DUE: May 9, 2012 @ 12:00 Noon**

	COMPANY	ADDRESS	CONTACT	PHONE	Proposed Fee
1	Integral Performance Solutions	5544 Whisper Creek Ln, Wilmington, NC 28409	Todd Hatley	919.656.5700	\$27,300.00
2	Emergency Management Solutions	141 South Main Street, Beacon Falls, CT 06403	Darrald Atwood	203.729.2800	\$9,800.00
3	Holdsworth Group	269 Main Street, Cromwell, CT 06416	Bob Holdsworth	860.638.1800	\$21,750.00
4	Tri Data Division, System Planning Corp	3601 Wilson Blvd., Arlington, VA 22201	Philip Schaezman	703.351.8298	\$30,000.00
5					

Robert J. Chimini
Purchasing Agent



**Retainer Agreement
between
SAMPLE
and
The Holdsworth Group, LLC**

1. The SAMPLE Ambulance ("you", "your"), hereby retains the services of The Holdsworth Group, LLC ("we", "our," "us") beginning _____, 2012 to assist with operational issues and the on-going needs of your organization.

Services, information and materials provided under this agreement may not be duplicated, shared, or otherwise distributed in any way to persons or organizations other than the New Milford Community Ambulance, or other people and agencies directly involved with you in the operation of your business. The information provided is exclusively for internal use by you.

2. You may call us toll-free during business hours with any questions or concerns related to the operation of your service or business. After business hours, your message in our 24-hour voice mail will be promptly returned the next business day. All communication with you or your workers and all access to your organization's materials will be handled in strict confidence.

3. You may use your retainer hours in any combination of the following:
- Telephone consultations
 - Discussion of specific incidents and recommended courses of action
 - Research to answer your questions
 - Generation of written answers to your inquiries -- faxed or mailed
 - Drafting documents and/or reports for the you
 - Representation at meetings as directed by you
 - Education/training sessions for workers, leaders, vendors or the media
 - On-site work - based hourly

4. Expenses are not part of this retainer agreement. (none expected)

5. In our rate schedule effective January 1, 2012, consulting services are billed at the normal rate of \$395.00 per hour/\$3,160 per day.

Travel, outside the State of CT, is billed at 50% of the applicable hourly rate.

As an existing client, this contract offers you a specially discounted rate beginning at \$350/hr.

Choose the number of retainer hours based on your anticipated needs, as shown below.

Hours are "banked" in your account until they are expended or up to 18 months from the date of this agreement. Additional hours may be purchased in blocks at the rates in effect at that time of the renewal.

Retainer for	Regular Rates	Retainer Fee	Savings
18 hours	\$ 7,110	\$ 6,300	\$ 810 - 12%
36 hours	\$14,220	\$12,060	\$2,133 - 15%
72 hours	\$28,440	\$23,320	\$5,120 - 18%

Please indicate your choice of service agreement.

Initial here

- a. 18-hour retainer, (1) **payment** due at contract signing _____
- b. 36-hour retainer, (2) payments of \$ 6,030.00 each _____
- c. 72-hour retainer, (2) payments of \$11,660.00 each _____

Note: For all multiple payment options, the first payment is due at the time of the contract signing. The additional payments are due on the 1st day of each subsequent month after signing OR if hours are expended faster due to project timetables, the next payment is due as soon as the current hours are expended.

We reserve the right to add 1.5% per month to outstanding balances over 30 days. You will be responsible for any collection costs and/or attorney's fees allowed by law. Any legal action required pursuant to this contract will be based in Connecticut and on applicable Connecticut law.

- 6. The issues addressed during evaluation and the formation of policies, plans and recommendations for the SAMPLE Ambulance may change without the control of The Holdsworth Group, LLC. It is understood that The Holdsworth Group, LLC will not be held liable for any workplace policies, practices or conditions not accurately disclosed to us, nor for changes that occur after our discussions, nor for recommendations that are not acted upon. This contract does not guarantee specific results or positive outcomes.

I have read the above listed terms and conditions and hereby agree that the contract shall be executed as listed. No other terms or conditions apply unless specifically authorized and agreed to in advance by both parties in writing. The determination that one or more provisions of this contract is invalid, void, illegal or unenforceable shall not affect or invalidate the remainder.

Signed this _____ day of _____, 2012

NAME, President
duly authorized representative
SAMPLE Ambulance

Robert L. Holdsworth, President
duly authorized representative
The Holdsworth Group, LLC

<p>Philanthropy Selection</p> <p>It is the corporate policy of The Holdsworth Group to donate 5% of gross sales to charity. Please select the charity that you would like us to support with the contribution from your engagement.</p> <p>Our 2012 designated charities are:</p> <p><input type="checkbox"/> Fathers of the Brave.org <input type="checkbox"/> St. Jude's Children's Hospital</p>
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