



HEALTHCARE RESEARCH

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HEALTHCARE EXPERTISE

Opinion Dynamics Corporation (ODC) is a leading, full-service market research for the healthcare industry. At ODC, we are committed to delivering tangible results and measurable improvements for our clients. The depth, scope, and diversity of our clientele demonstrate our success in meeting that commitment.

- ODC has more than 15 years of experience providing high-quality market research and analysis to the healthcare industry. Over that time, we have served dozens of hospitals, insurers, membership organizations, not-for-profit organizations, and others in the healthcare field.
- ODC goes beyond simply fielding survey instruments by providing actionable consulting services to improve market share, patient and member relations, and new products and services.
- ODC understands the industry-specific technical and sampling issues of healthcare-related research. We are committed to providing quality research and analysis that is precise and prompt.

ODC provides a variety of services to the healthcare industry, including:

- Strategic positioning
- Patient and member satisfaction studies
- Public attitudes and brand awareness
- Crisis communications
- Internal employee and staff satisfaction studies
- Evaluation of patient and member websites
- Market segmentation
- Provider selection
- Services and product evaluation

Patient and Member Satisfaction

- ODC surveys measure and evaluate your patients' and members' attitudes, perceptions, and patterns regarding your programs and services.
- ODC surveys are conducted through, but not limited to, mail questionnaires, telephone surveys, on-site surveys, in-depth interviews, and Internet surveys.
- Based on customers' perceptions of your company, we supply actionable recommendations to improve your external customer relations, thus your position in the marketplace.

Public Attitudes and Brand Awareness

- ODC's public attitudes and brand awareness studies can help you understand how you are perceived, relative to your competitors.
- ODC analysis provides you not only with your current standing in your community, but also with a blueprint for improving market share and standing in your community.

Communications Research

- Whether it's rising healthcare premiums, financial difficulties, cuts in service, or medical issues, nearly all healthcare organizations must deal with problems that threaten the patient and membership base. ODC's experience with helping healthcare organizations through difficult times is unmatched in the industry.
- Based on our extensive experience with communications research, we can recommend the specific message, messenger, and method of delivery for all significant communications.

ODC's high-quality survey research capabilities include: a dedicated telephone interviewing center, Internet capabilities, sophisticated data management, trained supervisors and support staff, and highly skilled statisticians and data modelers. These support services utilize proven protocol to guarantee quick turnaround and a high level of quality control for dependable results.

The range of our research services includes:

DEDICATED TELEPHONE INTERVIEWING SERVICE

At ODC, we maintain our own telephone-calling center in Philadelphia, PA. This allows us to ensure the highest quality results in our interviewing. For research firms that do not have their own interviewing services, or for firms whose interviewing service is a separate subsidiary in a global corporation, interviewing is a "black box": they put the interviewing in and wait to see what comes out. From the initial study to final recommendations, ODC is involved in every step of the research process.

All ODC telephone interviewers utilize Computer-Assisted Telephone Interviewing (CATI) software. The use of CATI introduces several advantages to the survey process. It virtually eliminates the chance of an interviewer skipping a question or entering a response that is outside the range of valid responses. It keeps track of all calls made to each sample point, providing extensive documentation of the number of attempts, the results of calls, and final case disposition. For example, the CATI system can track the number of times that each potential respondent was called, how many times there was no answer or an answering machine that was reached, etc. ODC can track all data and the amount of remaining sample and provide our clients with up-to-the-minute information. Finally, the CATI system greatly reduces the amount of effort needed to clean the data.

Our telephone capabilities include:

- Thirty-five Computer-Assisted Telephone Interviewing (CATI) stations with additional access to 200 CATI stations
- Quota control by demographics, location, incidence, or any research question
- Automatic call scheduling by day of week, time of day, time zone, and attempt number
- Ability to provide complete data sets in the following formats: **ASCII, SAS, ACROSS, WINCROSS, SPSS, Lotus 123, dBase**, and more
- Nightly data back-up on tape
- Server computer with an uninterruptible power supply to protect data connected to interviewing stations via a Novell Network

Our telephone bank offers:

- Full-time supervision and monitoring
- Professional, experienced interviewers and supervisors
- Continuous, random monitoring of all telephone interviewers
- Validation of at least 10% of every interviewer's work
- Verbatim recording of all open-ended responses as expressed by respondents

Quality control procedures include a detailed training and briefing session for each research study; a review of all completed questionnaires to detect procedural errors and omitted questions; respondent re-contacting to finish any incomplete questionnaires; rejection and replacement of questionnaires with a significant number of errors; and a final review of all the interviewer's work containing errors to consider possible rejection.

As a client of ODC, you are welcome to visit our interviewing facility, located in Philadelphia, PA, at any time. You can monitor your company's survey work in real time either at the center, from your offices, or from your homes via telephone hook-up.

IN-DEPTH AND QUASI-DEPTH SURVEYS

ODC staff of trained in-house interviewers conduct all in-depth and quasi-depth qualitative interviewing. The interviewers are knowledgeable about the healthcare industry and will be trained to gather the specific information requested. For in-depth interviews, we record and transcribe each interview to ensure we obtain all information and we provide copies of each transcribed interview as part of our reports. For quasi-depth interviews, we record topline data for all quantitative questions, and our interviewers are trained to record and summarize responses to allow our analytic team to draw conclusions. Whenever possible, we have the same interviewer conduct all interviews with a particular market actor group to ensure consistency of reporting.

FOCUS GROUPS

Focus groups involve interviewing a panel of participants at one time with a moderator. They are useful for identifying and exploring the range of attitudes, opinions, and preferences on a particular topic or issue. The open-ended nature of focus groups allows the researcher to make unexpected connections or to discover alternative ways to think about a topic. Focus groups, when combined with quantitative surveys, provide a powerful tool that can be used to reveal statistical relevance to issues raised or opinions expressed within the focus group setting. ODC has experienced focus group coordinators and moderators on staff who are adept at guiding group discussion and gaining valuable qualitative data.

MAIL SURVEYS

Opinion Dynamics regularly conducts mail surveys for a wide range of clients, and has developed a proven quality control system that is adapted to each new project. We provide a unique identifying number to each survey, enabling us to easily track respondents. From the time the survey questionnaire is completed to the final editing, coding, and keypunching, we pay close attention to every detail of the survey process. Among other things, quality control involves checking for inconsistencies in responses, looking for implied responses, and preparing the questionnaire for data entry. Inattentive editing can render mail survey results useless. We examine and double-check all stages of coding, data entry, and the verification process:

- Codes are established for open-ended questions, which are approved by the ODC project manager.
- Experienced staff code open-ended questions.
- We scan the data to eliminate values outside allowable ranges.

ODC gives careful attention to the design and management of all the mail surveys that we conduct. We use our own full-time experienced support staff prepare all mailings.

For mail surveys, we can provide all respondents with a link to the version of the survey on the Internet, which allows the respondent the option to answer the survey online. This increases the response rate as well as reducing potential response biases.

INTERNET SURVEYS

ODC staff develops both stand-alone Internet surveys hosted by our secure website and surveys that can be incorporated into an existing website and hosted from the client's server. Our Internet methodology ensures privacy while obtaining dependable results in short timeframe.

We work with our clients to design Internet-friendly questionnaires, which can incorporate pop-up options, skip patterns based on responses, company-specific logos or data, and links to outside information. Our clients can monitor results via a secure website, or this information can be sent to the client at their request.

ANALYTICAL TECHNIQUES

The analytical capability of our in-house staff, utilizing state-of-the-art methodologies, is one of ODC's most powerful assets. Regardless of how basic or sophisticated the analysis, the techniques that we employ are focused on practical, action-oriented applications for the real world. Some of the methodologies with which we have extensive practical experience include:

- Factor analysis
- Multidimensional scaling
- Discriminant analysis
- Conjoint analysis
- Perceptual mapping
- Cluster analysis
- Multiple regression
- Discrete choice modeling
- Latent structure analysis
- Market segmentation

SELECT HEALTHCARE CLIENTS

Advanced Rehab Systems
AIDS Action Committee
ALS Health Care Consultant Services
American Academy of Allergy, Asthma,
& Immunology
American Counseling Association
American Dental Association
American Insurance Association
American Society of Internal Medicine
Association of Schools of Allied Health
Professions
Astra Pharmaceuticals
Bellin Health System, Inc.
Beth Israel Deaconess Medical Center
Beverly Hospital
Blue Cross Blue Shield
CareGroup Healthcare System
Center for Information & Study on
Clinical Research Participation
(CISCRP)
Connecticut Hospital Association
Deaconess-Waltham Hospital
East Liverpool City Hospital
Federated Ambulatory Surgery
Association
Framingham Union Hospital
Goddard Hospital
Goddard House
Good Samaritan Hospital
Great Meadows Associates
Harvard Community Health Plan
Healthcare Association of New York State
Harvard Pilgrim Healthcare
Harvard University Health Services
Harvard University School of Public
Health
Health Alliance for NTI Patient Safety
Hospital Corporation of America
Humana Health Care
Hunt Hospital
Lahey Clinic
Leonard Morse Hospital
Massachusetts Hospital Association
Massachusetts Medical Society
Medical Academic & Scientific
Community Organization (MASCO)
MetroWest Medical Center
National Association of Healthcare
Quality
National Student Nurses Association
North Shore Medical Center
Northeast Health Care
Partners
Optima Healthcare
Prism Health Group
Regional Trauma Center
Shands Jacksonville Hospital
St. Elizabeth's Hospital
St. Luke's Hospital
Tufts Associated Health Plan
United Health Care
Winchester Hospital

SELECT HEALTHCARE PROJECTS

A regional Massachusetts hospital: Attitude surveys for a facility confronted by image problems brought on by malpractice allegations against its physicians.

A municipally owned hospital in suburban Boston: A telephone survey to measure public sentiment toward financing facility expansion and renovation.

A major national HMO: A series of surveys on expansion into new markets.

A major teaching hospital: A survey on attitudes toward its acquisition of community hospitals as satellite sites.

A mid-sized Massachusetts community hospital: A survey program measuring service territory image and patient satisfaction. The surveys tested the effectiveness of several potential new marketing programs, including a focus on maternity services that made this hospital the recognized market leader for those services.

A multi-physician clinic: A marketing survey among residents of a northern New Jersey community regarding the need for services in the area.

Advanced Rehab Systems: Focus groups among customers and non-customers to explore the current climate, understand ARS's position in the market, and explore new product options.

American Academy of Allergy, Asthma, & Immunology: A mail survey of members to measure satisfaction, develop member profiles, and investigate specific issues facing the industry.

American Society of Internal Medicine: National telephone surveys of physicians belonging to the society on such issues as government regulation of physician office laboratories, and ways that physician payment systems based on Diagnosis Related Groups (DRGs) affect patient care and hospital administration.

Associated Industries of Massachusetts: A survey measuring business attitudes toward HMO options for employees.

Association of Schools of Allied Health Professions: A multi-phased needs assessment research project with qualitative and quantitative research among members and non-members.

SELECT HEALTHCARE PROJECTS

Bellin Health Systems, Inc.: Segmentation study to identify divisions of current and potential BHS customers and to determine which sectors show the most potential for future growth based on customer experiences and attitudes. Research consisted of employee and consumer focus groups as well as residential telephone surveys.

Beth Israel Deaconess Medical Center: Comprehensive market research projects, including focus groups with caregivers, clinicians, and elders.

Blue Cross Blue Shield: Multiple surveys, including research among employees, employers, providers, senior citizens, and the general public.

CareGroup Healthcare System: A concept study of a secure website that allows patients to communicate with their physicians and access their healthcare information through the web.

Center for Information & Study on Clinical Research Participation (CISCRP): A study of adults with less than a college degree to test awareness and comprehension from educational materials on placebo-controlled trials. Also, national opinion polling to gauge public opinion in the U.S. regarding clinical research trials and studies.

Department of Employee Trust Funds (State of Wisconsin): Telephone interviews with participants across 28 health insurance plans to produce a satisfaction-based “report card” of the 28 plans available to state employees.

Federated Ambulatory Surgery Association: A mail survey to measure member satisfaction, value of services offered, and to determine the direction of future service offerings.

Goddard House: A survey of Boston area elderly residents on housing needs. The study determined the market for retirement housing adjacent to the nursing home and helped position the project to meet the needs of that particular group.

Harvard Pilgrim Health Care: Numerous telephone surveys for the largest HMO in New England, dealing with such issues as clinic satisfaction, factors involved with re-enrollment decision-making, attitudes of clients in markets targeted for expansion or takeover, and client willingness to go outside the plan for certain services.

SELECT HEALTHCARE PROJECTS

Harvard School of Public Health: A focus group among physicians to explore the impact of managed care on physicians and to guide the development of a quantitative survey instrument. Specifically, physicians were asked to reflect upon the changes that have occurred over the recent past in respect to the services they offer, the patients they treat, and the quality of care they are able to provide as a consequence of managed care. The focus group also explored physicians' current impression of their specialty, expectations for the future of the healthcare industry, and future plans.

Harvard University, University Health Services (UHS): Two projects, including:

- A mail survey of group health plan members designed to measure satisfaction with Harvard's group health plan and the services provided. In addition, ODC has conducted two former member surveys for UHS.
- A mail survey of undergraduate and graduate students designed to measure satisfaction with healthcare services provided by the university. The study also explored UHS's image on campus.

Health Alliance for NTI Patient Safety: A national survey, which tested public attitudes toward the substitution of generic for brand name drugs. The survey results garnered widespread coverage in the healthcare trade press.

Humana Health Care: A survey on public policy issues in Kentucky. Specifically, the project dealt with public attitudes toward the passage of the Health Care Reform Act of 1994, which set up a Health Purchasing Alliance.

Hunt Hospital: A corporate image study to determine how area residents felt about the community hospital and its competitors, and what steps were required to remain a viable competitor in the market.

Massachusetts Hospital Association: A statewide survey on public attitudes toward the healthcare problems facing Massachusetts. Residents were asked about their experience with healthcare delivery and state budget problems that affect the medical community's ability to offer the best possible healthcare.

Massachusetts Mental Health Association: A survey on public attitudes toward the mentally ill, treatment of mental illness, and related issues.

SELECT HEALTHCARE PROJECTS

MetroWest Medical Center: A telephone survey of community residents to measure the hospital's image, and residents' usage and satisfaction with services. Subgroup analysis was conducted to determine attitudinal, behavioral, and demographic differences between community residents who use the hospital and those who choose to go elsewhere.

National Association of Community Health Centers: A multi-phased needs assessment study involving qualitative (focus group) and quantitative (mail survey) research.

National Association for Healthcare Quality (NAHQ): Comprehensive national research project on public and practitioner perceptions of quality issues in healthcare.

National Student Nurses Association: Mail surveys among student members and faculty advisors to measure satisfaction with the association, explore student needs, and determine ways of increasing involvement with the association.

Northeast Health Care: A survey regarding a potential merger with another major area hospital on Boston's North Shore.

Public Affairs, Communications Strategy and Ballot Measure Campaign Research: Helped defeat two healthcare ballot measures in the state of Oregon (one dealing with capitation issues, the other with alternative healthcare), as well as two similar measures in California.

Shands Jacksonville Hospital: Focus groups following the creation of a new hospital system in Jacksonville, FL to increase the market for existing hospitals.

St. Elizabeth's/Caritas Christi: A survey program investigating consolidation of services and the impact of consolidation on the Greater Boston healthcare market.

St. Luke's Regional Hospital & Regional Trauma Center (Duluth, MN): A market-wide telephone survey among adults in the region, which tested a wide range of healthcare-related attitudes, as well as image and communications issues.

United Health Care: A marketing research project designed to evaluate the market potential for expansion into two new markets.

BIOS OF KEY ODC STAFF

JOHN GORMAN

Opinion Dynamics CEO John Gorman is one of the nation's leading experts in using public opinion and market research data to make decisions and plan campaigns. Mr. Gorman's thirty years of experience working on major research projects for presidential candidates, Fortune 500 corporations, and America's leading academic and non-profit institutions has given him a unique perspective on the strategic challenges facing policy makers today.

Mr. Gorman has authored public attitude studies on such diverse topics as electronic banking and America's military and economic role in the world. He has supervised research for environmental campaigns in the soft drink, paper, plastics and chemical industries. Mr. Gorman has also directed political research for hundreds of ballot question committees and ballot candidates like President Jimmy Carter, along with several congressmen, governors and local officials.

While an undergraduate at Harvard College in 1970, Mr. Gorman co-founded Cambridge Survey. Over the next decade, Cambridge Survey grew into one of the largest political polling firms in the country. Mr. Gorman then switched focus, helping to found Cambridge Reports in 1974, which provided issue and market research for business. Mr. Gorman and several associates founded Opinion Dynamics Corporation in 1987.

CHRIS ANDERSON

Since joining Opinion Dynamics Corporation in 2001, Chris Anderson has managed hundreds of projects in a variety of industries. He specializes in customizing research projects that enable his clients to both understand how people think, and then develop strategies to shape opinions and change behavior.

Mr. Anderson's work in the healthcare sector includes public policy studies, customer satisfaction studies for hospitals, and employee satisfaction and communications studies for a large HMO.

Working for a variety of associations, Mr. Anderson has helped his clients understand the drivers that keep their members satisfied, and identify the benefits, services and messages that will attract new members. Mr. Anderson is also an experienced political pollster, having worked for candidates at the local, state, and national level.

Mr. Anderson received a master's degree from Columbia University, where his studies focused on statistical analysis, public opinion, and political science. He received a bachelor's degree in English from Colby College. Prior to joining ODC, Mr. Anderson worked for Kiley and Company, the national political polling firm. He also worked as a pollster on Senator John Kerry's 2004 presidential campaign.

BIOS OF KEY ODC STAFF

HENRY KANTER

As Vice President of Operations, Henry Kanter is responsible for the quality of research at Opinion Dynamics. He oversees the training, monitoring, and quality control of all interviewing, data entry, and computer operations. Mr. Kanter has managed more than 2,500 research studies, including telephone and mail surveys, opinion leader and executive interviews, in-store intercepts, focus groups, and nationwide door-to-door surveys. He is fully versed in all aspects of the research process, from sample design to computer operations. Mr. Kanter also supervises all sub-contractor activities.

Mr. Kanter has over twenty years of experience in survey research. He came to Opinion Dynamics from Cambridge Reports, where he was Field Director. Mr. Kanter is a graduate of the University of Massachusetts, Amherst, and a member of the Marketing Research Association.

LAWRENCE SHIMAN

Since joining Opinion Dynamics Corporation in 1998, Lawrence Shiman has managed hundreds of projects in a variety of industries. He regularly partners with advertising, marketing, and public relations firms in providing information and analysis that advances client goals.

Mr. Shiman is one of the nation's leading experts in consumer behavior related to dieting and nutrition. The results of his research in this area have been published in hundreds of mainstream and industry publications and media outlets. Mr. Shiman is also a highly skilled public speaker, having presented research results at nearly a dozen different international conferences in the past year. He appears regularly on national television, providing analysis of ODC polling results on the FOX News Channel.

Mr. Shiman received a master's degree from the Kennedy School of Government at Harvard University, where he specialized in public opinion and public policy. He received his undergraduate degree in psychology from New York University.