



## Data Modernization Initiative

### Request for Quotes (RFQ) – Partner Engagement Contractor

Date Issued: December 1, 2022

Date Questions Due: December 7, 2022

Response Due: December 14, 2022

**CDC FOUNDATION CONTACT**

[DMI@CDCFoundation.org](mailto:DMI@CDCFoundation.org)

**PURPOSE**

Centers for Disease Control and Prevention’s (CDC’s) Public Health Data Modernization Initiative (DMI) works in multiple priority areas to assure sustained improvements to data systems in service to the public’s health. To maximize health improvements through data- and science-driven practices, communities require access to complete, timely, and user-friendly data. The CDC Foundation supports this critically important work through a variety of activities.

The CDC Foundation seeks support for identification and engagement with key stakeholders. The contractor(s) will work with the project team to identify organizations and persons to engage in this project; plan and perform outreach to engage them; stimulate, capture, and summarize high quality input from partners.

Through this Request for Quotes (RFQ), the CDC Foundation is soliciting quotes from a contracting entity/contractor with expertise in partner engagement.

**SERVICES REQUIRED**

The CDC Foundation seeks quotes from experienced Contracting entities/Contractors to provide support for Partner Engagement. The contractor will:

- Co-develop and support a Strategic Engagement Plan that facilitates dissemination use of various resources that support accelerating public health data modernization within and across communities
- Work with CDC Foundation program staff to convene expert working groups to inform technical specifications
- Conduct working group sessions using design thinking approach that facilitates stakeholder engagement and support

The contract to work on the scope of services outlined is projected to end **on July 31, 2023**. Some aspects within the Scope of Work are currently in progress and could be completed prior to engagement of the contractor. Scope of work completion will be assessed by regular check-ins with the project team to ensure work is conducted. In your budget and budget narrative submission, please provide a proposed quote for the scope of services outlined below along with approximation of hours and hourly rate.

**Scope of Work**

<b>Services to be Provided</b>
Form agile, time-limited working groups focused on guiding resource development on data release standards, data usage agreements, governance, and other relevant matters on shared services and salient tools for Public Health Agencies, Community-based Organizations, and other partners.
Attend meetings directly related to the projects as directed by the CDC Foundation.
Identify organizations and persons to engage in this project; plan and perform outreach to engage them.
Draft and finalize stakeholder engagement roadmap and plan activities to accomplish engagement goals.
Convene expert working groups (participants including but not limited to community-based organizations, industry/healthcare, state, local, tribal, territorial and federal entities) to inform technical specifications.
Conduct working groups using design thinking approach that facilitates stakeholder engagement and support.
Help capture and summarize high quality input from partners.

Provide support throughout the engagement lifecycle including assessment, execution, and sustainment.

### **Deliverables**

The Contractor will produce and/or deliver the total number of the following project activity services, events, products, and/or deliverables.

1. Partner Process Outline
2. Partner Meeting Planning with Project Team
  - a. Attend meetings directly related to the projects as directed by the CDC Foundation.
  - b. Facilitation of Partner Meeting Planning
  - c. Strategy Sessions
3. Partner Working Group Planning and Execution
  - a. Form agile, time-limited working groups focused on guiding resource development on data release standards, data usage agreements, governance, and other relevant matters on shared services and salient tools for CBOs and other partners
  - b. Facilitation of Partner Working Groups
  - c. Document workgroup discussions, findings, and decisions
  - d. Facilitate partners' preparations or follow-up tasks related to the workgroup.
4. Development and Execution of Partner Engagement Plan
  - a. Engagement plan development and implementation. Outputs include working versions of the engagement plan for review and discussion. Engagement plan components may include but are not limited to analyses of the internal and external DMI environments, situation assessments, SWOT analysis, critical gap identification, stakeholder analysis and mapping of identification of strategic opportunities for partner engagement.
  - b. Drafting and finalization of Stakeholder Engagement Roadmap
  - c. Assist with pre-planning of engagement activities included but not limited to agenda development, moderator guides, technical support, communication/dissemination plans.
5. Logistics
  - a. Arrange and manage travel and accommodations for attendees of in-person working group meetings.
6. Outputs from engagement activities may include but not be limited to the following: meeting agendas and detailed notes, moderator guide, meeting recordings and transcripts, working group meeting summaries and syntheses, and lessons learned.

### **SUBMISSION REQUIREMENTS**

Kindly submit a packet including an expression of interest letter, capability statement, completed detailed budget template, budget narrative, at least two references, and CVs of all major personnel via the Smartsheet link below by **December 14, 2022**.

We reserve the right to deem incomplete submissions ineligible for review.

**Expression of Interest Letter (EOI).** The EOI shall give a background on the individual/organization's background and experience with public health and engagement work (page limit: 1 pages).

**Capability Statement.** Demonstrate the individual's/organization's capability to successfully deliver on the scope of services outlined above (page limit: 2 pages).

**Completed Detailed Budget Template.** Use provided Excel template to prepare and submit a detailed budget.

**Budget Narrative.** Prepare a budget narrative including justifications for all costs included in detailed budget template.

**References.** Names and contact information for 2 references.

**Curriculum Vitae (CV)** or resume for key project personnel (page limit: 2 pages per CV/resume).

**Quotes must be submitted electronically at:**

<https://app.smartsheet.com/b/form/e2cc6e9200f04cd58dab63dac800d917>

Please email any submission and/or project-related questions to [DMI@CDCFoundation.org](mailto:DMI@CDCFoundation.org) by **December 7, 2022, 4 PM EST. Please reference DMI Partner Engagement Contractor in the subject line.**

Please use the Excel budget template to prepare and submit your financial quote.

Submissions will be evaluated on vendors’ qualifications, expertise, and reasonableness of cost. The following outlines the criteria that reviewers will use to guide their evaluation of each application.

**To limit delays for the selected vendor, you will be asked to submit the following information with your quote: EIN/TIN #, DUNS #, SAM Registration Number, Income Statement and Balance Sheet, and/or IRS 990 Tax form.**

**EVALUATION AND SELECTION CRITERIA**

Submissions will be evaluated on vendors’ qualifications, expertise, and reasonableness of cost. The following outlines the criteria that reviewers will use to guide their evaluation of each application.

Domain	Capability Statement	Experience	Cost Quoted
<b>Application Selection Criteria</b>	Capability statement that demonstrates your ability to deliver services as requested in this RFQ (Qualifications)	Organizational reference to all related experience, including CVs for all project staff which reflect tenure and/or education	Reasonableness of proposed rate
<b>Weight</b>	25%	25%	50%
<b>Weight Criteria Breakdown</b>	<ul style="list-style-type: none"> <li>Capability statement address all aspects of the scope of work <b>10%</b></li> <li>Capability statement addresses ability to complete all deliverables <b>15%</b></li> </ul>	<ul style="list-style-type: none"> <li>Experience managing webinars and/or organizing and facilitating meetings (Past project descriptions). <b>15%</b></li> <li>Relevant experience of project staff <b>10%</b></li> </ul>	<ul style="list-style-type: none"> <li>Detailed Budget <b>10%</b></li> <li>Budget Narrative <b>10%</b></li> <li>Reasonableness of Scope of Work to Proposed Rate <b>30%</b></li> </ul>

**PRE-AWARD RISK ASSESSMENT**

The CDC Foundation reserves the right to conduct financial and due diligence reviews. As a public entity, the CDC Foundation has a responsibility to the public to ensure that the organizations that receive grant funds are financially stable and to evaluate each applicant’s risk of noncompliance with Federal statutes, regulations, and the terms and conditions of the subaward for purposes of determining the appropriate method of monitoring.

**MAXIMUM PAYABLE AMOUNT (MPA)**

CDC Foundation will pay the contractor a fee not to exceed a Maximum Payable Amount (MPA) or ceiling price. The MPA will be based on the fee proposed and awarded and will be negotiated as part of the resulting contract. CDC Foundation requests bidders include a cost-reimbursable budget, utilizing the attached budget template.

### **FUNDING SOURCE**

The agreement resulting from this RFQ will be supported by Federal funding under the “Data Modernization Initiative Working Groups” project via Cooperative Agreement Number 6 NU38OT000288-05-01 from the Centers for Disease Control and Prevention.

The CDC Foundation anticipates that award(s) resulting from this solicitation will meet the criteria of “contractor” as defined by 2 CFR 200.331; a final determination will be made at the time of the award. The contractor must comply with the following federal regulatory requirements:

- Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Health and Human Services (HHS) Awards (45 CFR Part 75)
- Uniform Administrative Requirements, Cost Principles, and Audit Requirements, and Audit Requirements for Federal Awards (2 CFR Part 200).

### ***Submitting a Quote***

Application materials should be submitted by:

**December 14, 2022**

Quotes will not be accepted after this date and time.

Quotes must be submitted electronically at:

<https://app.smartsheet.com/b/form/e2cc6e9200f04cd58dab63dac800d917>

We recommend you begin to submit your quote by 11:00 AM EST to allow sufficient time to address any unexpected technical issues.

Please email any submission and/or project-related questions to:

[DMI@CDCFoundation.org](mailto:DMI@CDCFoundation.org) by December 7, 2022.

**Reference DMI Partner Engagement Contractor in e-mail subject line.**