

**Request for Proposals**

**Building the Business Case for Hypertension Control – Research, Evaluation, or Analytics Firm**

Date Issued: December 1, 2022 **(REVISED DECEMBER 13, 2022)**

Due Date: December 22, 2022, by 11:59 pm Eastern Time

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# CDC FOUNDATION

The National Foundation for the Centers for Disease Control and Prevention (CDC Foundation) helps the Centers for Disease Control and Prevention (CDC) save and improve lives by unleashing the power of collaboration between CDC, philanthropies, corporations, organizations, and individuals to protect the health, safety and security of America and the world. The CDC Foundation is the go-to nonprofit authorized by Congress to mobilize philanthropic partners and private-sector resources to support CDC’s critical health protection mission. Since 1995, the CDC Foundation has raised over $1.6 billion and launched more than 1,200 programs impacting a variety of health threats from chronic disease conditions including cardiovascular disease and cancer, to infectious diseases like rotavirus and HIV, to emergency responses, including COVID-19 and Ebola. The CDC Foundation managed hundreds of programs in the United States and in more than 160 countries last year. Visit [www.cdcfoundation.org](http://www.cdcfoundation.org/) to learn more.

# FUNDING OPPORTUNITY

The CDC Foundation was awarded a federal grant to promote evidence-based strategies to prevent cardiovascular risk factors and control hypertension by developing a business case for the cost-effectiveness of investments in hypertension control in the workplace.

The CDC Foundation Non-Infectious Disease Department is seeking assistance from an economic evaluation consulting organization to establish a business case for employer engagement in hypertension prevention and control. This work emerges from the CDC Foundation's ongoing work in support of the US Centers for Disease Control and Prevention and the National Hypertension Control Roundtable, as they seek to engage employers in implementing health and well-being programs that address hypertension prevention and control and in implementing best-practice health benefits that support healthy blood pressure.

The CDC Foundation intends to award a contract to one selected respondent to this RFP to support establishing a business case for employer engagement in preventing and managing hypertension. To prepare, the Contractor will conduct a literature review and summarize what is known about the epidemiology and economics of hypertension from an employer perspective. The Contractor will use that information to design a budget impact model and educational tools for the employer audience. The goal is to inform employers of the health and economic benefits of addressing hypertension in the workforce while motivating employers to engage in evidence-based strategies, including health benefit design and actions to address hypertension. While this project focuses on mid-size and large self-funded employers, the Contractor will also be asked to consider relevant messaging for smaller, fully insured employers.

## 2a. Minimum Applicant Eligibility Requirements

Offers must meet all the following eligibility criteria:

* Headquartered in the United States
* In good financial standing and have sustainable operations

The CDC Foundation reserves the right to conduct a pre-award risk assessment to assure offerors meet the eligibility criteria. Data available through third-party sources such as Dun & Bradstreet may be consulted, along with information publicly available via Federal and State awards, debarment, exclusion, and sanction databases. If the applicant is a subsidiary or affiliate of another organization, the relationship must be disclosed in the organizational experience and capacity section of the application.

## 2b. Period of Performance

The anticipated period of performance is January 30, 2023 – June 30, 2023.

## 2c. Place of Performance

The selected organization will carry out tasks at their offices and work with the CDC Foundation virtually.

## 2d. Maximum Payable Amount

The total budget for all work related to the project must not exceed an anticipated Maximum Payable Amount of USD 250,000. The final award amount is contingent on submitting a detailed and reasonable budget to be approved by the CDC Foundation and will be incorporated into the resulting contract.

## 2e. Funding Source

The resulting award will be supported, entirely or in part, by Federal funding through a cooperative agreement between the CDC Foundation and the Centers for Disease Control and Prevention: Strengthening Public Health Systems and Services through National Partnerships to Improve and Protect the Nation's Health with the award number 6 NU38OT000288-05-01.

## 2f. Agreement Classification

The CDC Foundation anticipates that award resulting from this solicitation will meet the criteria of “contractor” as defined 2 CFR (Code of Federal Regulations) 200.331; a final determination will be made at the time of the award.

## 2g. Agreement Type

The CDC Foundation anticipates awarding a Fixed Price/Deliverables agreement with payment issued based on completed tasks, milestones and/or deliverables but reserves the right to change the method of payment. An invoice template will be provided after the contract is awarded.

# SCOPE OF WORK

## 3a. Summary of Request

The successful applicant will be expected to complete the following five (5) tasks: describe the epidemiology and health impact of hypertension with emphasis on the working-age population (10%), describe the economic burden of hypertension from the employer perspective (10%), develop a budget impact model from the employer perspective (30%), develop an employer template for claims data analysis (20%), and synthesize the business case into documentation for the employer audience (30%). These tasks are further described below.

## 3b. Background and Need

The population prevalence of hypertension in adults over age 18 is estimated at 45.4%, and at 54.5% in the 40-59 age group [https://www.cdc.gov/nchs/products/databriefs/db364.htm]. Hypertension, therefore, is highly prevalent in the working-age population. Concerns have been raised that employers have not dedicated resources to hypertension to the same degree as they have for other chronic conditions such as diabetes, in part because it is challenging to measure hypertension prevalence within their populations and that hypertension is not a significant cost driver compared to other conditions when analyzing claims data by diagnosis. Emergency department visits, hospitalizations, and other costly care episodes may result from uncontrolled hypertension, but the primary diagnosis for these visits is rarely hypertension. However, hypertension is well-established in the scientific literature as a driver of morbidity, mortality, utilization of healthcare services, and direct and indirect costs.

## 3c. Objective

This project aims to develop a compelling and user-focused economic analysis tool demonstrating the cost-effectiveness of investments in hypertension control in the workplace.

## 3d. Scope of Work

**TASK 1:** Describe the epidemiology and health impact of hypertension with emphasis on the working-age population (10%)

The Contractor will review the published scientific literature and government data and resources, supplemented with web searches of grey literature and reports for additional information on the epidemiology of hypertension. At a minimum, the Contractor will examine the following:

1. Prevalence of hypertension in the working-age population (18-65)
2. Impact of hypertension on cardiovascular and cerebrovascular disease incidence, prevalence, and health outcomes (morbidity and mortality)
3. Impact of hypertension on exacerbation of other co-morbidities, including diabetes and obesity
4. Relevant information on disparities and inequities in the prevalence and impact of hypertension in demographically defined subgroups, including age, gender, race, ethnicity, income, education level, geography
5. Impact of social determinants of health as risk factors for hypertension and on hypertension outcomes

The Contractor will prepare a report synthesizing this work. The report will include, at a minimum, sub-headings for each of the five topics above, with appropriate citations.

**TASK 2:** Describe the economic burden of hypertension from the employer perspective (10%)

The Contractor will review the published scientific literature, supplemented with web searches of grey literature and reports, to identify and summarize available information on the economic burden of hypertension from the employer perspective. The review will consider the following:

1. Direct costs to employers, expressed as a per person per year cost (i.e., average total direct cost per person per year for employees with hypertension) and as an incremental per person per year cost (i.e., additional average annual cost per employee with hypertension, compared with the general working-age or employee population, or employees without hypertension).
2. Indirect costs to employers (i.e., lost productivity), including estimates of absenteeism and presenteeism, expressed per employee per year, with appropriate comparators.
3. Disability costs associated with hypertension-related sources of disability, including cardiovascular and cerebrovascular events in the working-age population.
4. Health benefit design choices related to hypertension to determine the cost to employers and hypertension interventions that can improve outcomes and decrease costs.
5. Evidence of effectiveness and cost-effectiveness of interventions to address hypertension in employed populations, using examples and case studies from employer programs (e.g., low/no cost medication co-payments, innovative pharmacy packaging, medication therapy management, self-measured blood pressure monitoring). Self-Measured Blood Pressure (SMPB) monitoring).

To the extent that information is unavailable or of limited availability for any of these economic categories, the Contractor may extrapolate information for the general population to the employed or working-age population. The Contractor will prepare a report synthesizing this work. The report will include, at a minimum, sub-headings for each of the four topics above, with appropriate citations.

**TASK 3:** Develop a budget impact model from the employer perspective (30%)

Based on the information derived from Tasks 1 and 2, the Contractor will develop a budget impact model or another appropriately similar tool to help employers understand the potential economic impact of hypertension in their population. The Contractor should consider how to best make a case for employers to engage in strategies, including health benefit design, to prevent and manage hypertension in their populations. Ideally, the Contractor will prepare a model that allows the employer to enter population descriptors for their employed or covered populations—such as the number of individuals, age and gender distribution, and race and ethnicity distribution—and to calculate the estimated economic impact of hypertension in their population, expressed as total direct and indirect costs for the population, as well as per employee per year direct and indirect costs. The contractor will determine an appropriate format for the model, such as a spreadsheet, or a web-based fillable form. The model will be made available to employers, so it should include instructions in the form of a user guide. The contractor will provide CDC Foundation with documentation of citations used in populating the model, and key assumptions and limitations.

**TASK 4:** Develop an employer template for claims data analysis (20%)

The Contractor will prepare data specifications for employers who want to examine and further understand the impact of hypertension in their population by analyzing their own claims data. The specifications will identify the appropriate ICD-10 codes (and CPT codes, as relevant) to identify the population diagnosed with hypertension and then provide guidance on how to examine the population by demographics typically included in claims and eligibility files and key categories of utilization (e.g., hospitalizations, emergency department visits, pharmacologic treatment). Other potential attributes of this guide to claims analysis will be informed by the literature review conducted to support Tasks 1 and 2.

**TASK 5:** Develop a business case for investment in hypertension control for the employer audience (30%)

Since the objective of this project is to establish the business case for employer engagement in preventing and managing hypertension, it is essential that the contractor package results of each of the above-listed tasks in formats that will make a compelling case in a compelling format. The successful applicant will summarize and translate project results and create content for appropriate dissemination channels using different methodologies aligned with the intended audience through message testing and audience segmentation. The applicant will be expected to work with the business community to determine the best way to use the data to inform practice.

1. Identify the basic elements of research content relevant to practice - Develop an outline of materials that will focus on the implications of these analyses for each potential user group, including an explanation of their significance and specific recommendations about how to proceed based on these results.
2. Describe the scope and characteristics of the potential users - Identify user characteristics for targeting messages, such as the format and depth of information typically needed; the level and amount of contextual information preferred; trusted sources of information; preferred media of economic and prevention information, capacity to use economic information; and their readiness to introduce changes based on information.
3. Inform the medium and sources through which messages can be delivered - Establish the best delivery mechanism by conducting a careful, empirical assessment.
4. Identify barriers that may interfere with access and utilization and develop strategies to reduce these. Start with documented typical barriers, empirically assess and then revise as the project unfolds, emphasizing relevance and timeliness for intended users.
5. Using this information, develop all creative materials and assets for the target audience.

## 3e. Outputs

The Contractor will produce the following deliverables for dissemination to an audience of employers, benefits consultants, and other relevant stakeholders (but developed with the employer audience in mind):

1. A comprehensive report on the Business Case for Hypertension Control. The report will include a detailed literature analysis synthesizing disease prevalence using a health equity lens, business programmatic findings, economic impact and effectiveness of key employer interventions and health benefit design, and evidence-based actions private employers can take. The Contractor will determine how best to communicate these findings in written text, infographics, and/or other formats, recognizing that the presentation needs to be compelling and concise. (Tasks 1, 2, and 5).
2. Budget impact model, including user's guide and description of key assumptions. (Task 3)
3. Claims Data Review template for employers and user guide/instructions. (Task 4)
4. Presentation deck (PowerPoint or other suitable presentation file format), with speaker notes annotation, for presentation to single employers and groups of employers (e.g., business coalitions on health). (Task 5)
5. Communication plan and creative materials to disseminate information to the target audience. (Task 5)

# PERFORMANCE MONITORING

The performance will be monitored in line with the agreed project plan. The selected organization will be expected to work in close collaboration and consultation with the CDC Foundation and the CDC. The plan for each deliverable will be an important part of the overall project plan. Furthermore, as agreed, regular reviews/coordination will be undertaken as work progresses.

| Administrative Deliverables | Required Services  | Performance Standard  | Acceptable Quality Level  | Monitoring Method  |
| --- | --- | --- | --- | --- |
| Kick-off meeting documents | » Preparatory work for the kick-off meeting» Follow-up documentation from the kick-off meeting | Quality and timeliness of documentation, as assessed by CDC Foundation Programs staff | » Preparatory and follow-up documentation delivered within the specified period» Documents sent back to Contractor for revisions no more than once due to Contractor error | » CDC Foundation Programs staff review» Date of delivery |
| Project Plan  | » Maintain a project schedule and plan in a place accessible to Contractor/CDC Foundation stakeholders on demand» Capture, at a minimum, project tasks, deliverables, milestones, timelines, assumptions/constraints, final output specifications, and responsible parties | Quality and timeliness of documentation, as assessed by CDC Foundation Programs staff | Documents sent back to the Contractor for revisions no more than once due to Contractor error | CDC Foundation Programs staff review |
| Change log | » Maintain a change log in a place accessible to Contractor/CDC Foundation stakeholders on demand» Track changes to work plan tasks, deliverables, milestones, and final output specifications | Quality and timeliness of documentation, as assessed by CDC Foundation Programs staff | Documents sent back to the Contractor for revisions no more than once due to Contractor error | CDC Foundation Programs staff review |

# INSTRUCTIONS FOR OFFERORS

Applicants should follow the instructions below in submitting their proposal to the CDC Foundation. CDC Foundation will not be responsible for any proposal that does not follow the instructions in this RFP and may, at its discretion, reject any such non-compliant proposal.

# PROPOSAL CONTENTS

## 6a. Proposal Section 1: Company Overview

The following information should be provided directly in the online form found here:

<https://app.smartsheet.com/b/form/5fbc656749ca47cc8c2eea3c219b4018>

|  |  |  |
| --- | --- | --- |
| * Legal Company Name
* Abbreviated Name
* Street Address
* City, State, Zip Code
* Year Established
 | * Data Universal Number System (DUNS) number
* System of Award Management (SAM) registration status
* Federal Tax Identification (ID) Number/Employer Identification Number (EIN)Number of Employees
* Business Classification(s)
 |  **ELIGIBILITY CRITERIA*** Confirmation of being headquartered in US
* Confirmation of being in good financial standing/having sustainable operations
 |

## 6b. Proposal Section 2: Required Attachments

Offerors should upload the following required attachments to the online form. The online form and attachments must be completed in one session.

* + Narrative proposal – Organizational Experience, Project Plan and Approach
	+ Appendix A – Budget
	+ Appendix B – Budget Narrative
	+ Appendix C – Sample Work Products
	+ Appendix D – Curriculum Vitae (CV) or Resumes
	+ Appendix E – Financial Statements

The narrative proposal should include the following sections, organizational experience, project plan and approach. Proposals should be no more than six (6) pages, single-spaced, in 11-point font, and with one-inch margins, excluding appendices. The proposal narrative should address the following elements:

|  |
| --- |
| **Organizational Experience** |
| Include a capability statement demonstrating the organization's ability to implement the scope of work described in the RFP. The successful applicant will have experience in applied economics, econometrics, behavioral health, and/or behavioral economics. The scientific rigor will be essential to the work. The selection of subcontractors will be based on the capacity to fulfill these expectations. The applicant is also expected to be well-versed in qualitative methodology, including literature reviews, coding and analysis, report writing, and facilitating reflexive conversations through interviews and focus groups. The contractors should have experience working across diverse sectors, the ability to use mixed methods data, and a favorable relationship with the CDC Foundation and/or CDC. Include staff bios highlighting specific experience related to the requirements of this solicitation. Only individuals listed in the budget (who will work on the project) should be included. Note: Use of consultants/contractors is allowed. Briefly describe any previous experience highlighting examples of related work (lists or links to reports, published articles, briefs, bulletins, or PowerPoint presentations are acceptable). Specific product samples should be provided in Appendix B. |
| **Project Plan and Approach** |
| The applicant will describe an approach demonstrating a clear understanding of the issue, the rationale for the economic analysis tool, intended utility, and usability, and articulate a vision for the dissemination materials. Include the following:* Timeline for completing the tasks described in the scope of work within the specified timeframe.
* Description of how you will develop and test the economic analysis tool/model, including how you will engage the business community for input and feedback.
* Necessary resources needed to perform the project (e.g., statistical software packages).
* Vision for creating and disseminating communication materials for the target audience.
* Identify where in the project you will be integrating approaches for health equity
* Staffing plan including a description of the roles and responsibilities of the specific personnel assigned to this project, including any consultants/contractors.
 |
| **Appendices A-E** |
| A: Budget | Include a detailed budget. Guidelines have been provided with the RFP to assist applicants with budget preparation. Please find additional guidance on budget requirements below. |
| B: Budget Narrative | Include a detailed budget narrative. Guidelines have been provided with the RFP to assist applicants with budget preparation. Please find additional guidance on budget requirements below. |
| C: Sample Work Products | Sample Product that demonstrates that you have the capacity to plan and implement this project. Please include at least one previously developed product completed no more than three years ago. |
| D: Curriculum Vitae (CV) or Resumes | Please submit one resume or CV for each of the key members of the team outlining relevant work history. All resumes and CVs should be combined into a single document when uploading the application. It is not necessary to submit resumes or CVs for all team members, only the key members of the project. |
| E: Financial Statement | Single Audit Report or Audited Financial Statement. |

## 6c. Budget Guidelines

The total project budget should not exceed USD 250,000. A detailed budget should be submitted with a supporting narrative for all anticipated costs. The budget narrative should conform to the attached CDC Office of Grants Services (OGS) budget preparation guidelines.

This solicitation intends to support expenses that are directly attributable to project outcomes. Proposed budget costs should be necessary for the appropriate and efficient performance of activities specific to the goals and purpose of this project. Due to the amount of funding available and the short duration of the project period, applicants are encouraged to refrain from budgeting indirect costs (costs of doing business that is not readily identified with the objectives of this grant - e.g., utilities, insurance, payroll taxes, capital expenditures for general purpose equipment, etc.) and include direct costs (e.g., salary, fringe benefits, supplies, travel (meal and incidental expenses), contractual, consultant costs, etc.) required to execute the grant instead. Costs should be broken down by task and supported by the appropriate narrative highlighting the alignment to the project.

**Salaries**

This category captures the costs of personnel assigned to work directly on the project. Costs identified under personnel are only for project staff who are employees of the applicant organization. Costs for project staff who are not employees of the applicant organization should be included under Consultants/Contractors. Ensure that the budget duration is adjusted to 5 months (January 30, 2023 – July 30, 2023) for salary and fringe calculations.

**Contracts**

The CDC Foundation acknowledges that you may not have complete information for any contract at the budget development stage. However, if you are using a sub-contractor, we would like to understand what is expected to be accomplished by each contract and the estimated costs. Please provide the calculations used to derive the requested budget in the cost calculation section.

Grant funds may only be expended against any contract in your budget within the final approved grant period. If CDC Foundation funds are the anticipated sole source of support for the project funded by your award, the contract start date should not be earlier than the start date of your award, and the end date should not be later than the end date of the award.

**Budget negotiation**

The budget narrative for applicants selected to move forward will be reviewed and negotiated to ensure that they meet the goals and objectives of the proposed project and that they are consistent with CDC Foundation policies. Therefore, during budget negotiation, you may be asked to revise the budget and budget narrative before the final budget is approved for funding.

## 6d. Submitting a Proposal

Proposal materials must be submitted by 11:59 pm EST on Thursday, December 22, 2022.

Proposals will not be accepted after this date and time. Proposals must be submitted electronically at

<https://app.smartsheet.com/b/form/5fbc656749ca47cc8c2eea3c219b4018>

Offerors are encouraged to submit their proposals 24 hours before the due date to allow sufficient time to address any unexpected technical issues.

# SELECTION PROCESS AND REVIEW CRITERIA

## 7a. Anticipated Timeline

The timeline below is subject to change at the sole discretion of the CDC Foundation:

|  |  |
| --- | --- |
| December 1, 2022 | RFP Release |
| December 8, 2022, 11:59 pm ET | Deadline for Prospective Offeror Inquiries |
| December 13, 2022 | Release of RFP Supplement/Responses to Prospective Offeror Inquiries |
| December 22, 2022, 11:59 pm ET | Proposal Submission Deadline |
| Early January | Selection Notification |
| January 30, 2023 | Anticipated Start Date |

## 7b. Communicating During the RFP Period

All questions and requests for clarification regarding this RFP should be submitted by prospective offerors in writing no later than 11:59 pm ET on Thursday, December 8, 2022, using the following link:

<https://app.smartsheet.com/b/form/162f1c65e4434e1dbb87e077257038a2>

Responses to all questions and requests for clarification received by the stated deadline for inquiries will be consolidated into a single RFP supplement and shared on the CDC Foundation website by 11:59 pm ET on December 13, 2022. Inquiries received after the stated deadline will not be addressed.

## 7c. Evaluation

CDC Foundation will evaluate all applicants for completeness and minimum requirements. Basic requirements include timely receipt of the application and submission of all required attachments. Applications with omissions of any required documentation will be subject to disqualification. The CDC Foundation also 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 sub-recipient monitoring, per program year. Further written materials to assess risk may be requested during or before the review. The following table outlines the criteria reviewers will use to guide the evaluation of each proposal.

|  |  |
| --- | --- |
| **Evaluation Criteria** | **Points** |
| **Organizational Experience** | **30 Points** |
| The review will include an assessment of your organizational history, your capacity and experience relating to the requirements within this RFP, and evidence of previous work.  |
| **Project Plan and Approach** | **50 Points** |
| The review will include an assessment of the overall approach and strategy described/outlined in the proposal that demonstrates a clear sense of what outcomes you aim to assess, justification, intended utility, and how you will complete the indicated scope of work within the specified timeframe. |
| **Proposed Budget and Budget Narrative** | **20 Points** |
| A detailed budget and narrative rationale for all anticipated costs during the six-month project period (from January 2023 through June 2023). |
| **Total Possible Points** | **100 Points** |

## 7d. Notification to Offerors

All applicants will be notified of whether their proposal was selected for funding. The CDC Foundation will not provide scores or specific review feedback to unsuccessful applicants.

Attachments:

1. OGS Budget Preparation Guidelines
2. CDCF Budget Template
3. CDCF Budget Narrative Template