

# **Capacity Building for Public Health Analysts in the Overdose Response Strategy**

Centralized Reporting System

## **Request for Proposals (RFP)**

CDC Foundation  
Response, Crisis and Preparedness Unit

Date Issued: October 4, 2021

Date Response Due: November 8, 2021

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### **CDC FOUNDATION CONTACT**

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## 1. CDC FOUNDATION

The 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 \$1.2 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 140 countries last year.

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## 2. SUMMARY OF REQUEST

The CDC Foundation seeks a contractor to propose and develop a centralized reporting system for the [Overdose Response Strategy](#) (ORS) program to easily track and monitor Public Health Analyst (PHA) and Drug Intelligence Officer (DIO) activities across the ORS network. This centralized reporting system will be used to track, monitor and store ORS projects and activities that support ORS Team's Action Plans, program success stories, annual survey data and other program performance measures. In result, there will be a more holistic understanding of the collaborative impact of these teams in each jurisdiction, and ultimately, the impact and success of the overall program.

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## 3. BACKGROUND AND NEED

The Overdose Response Strategy is a unique public health/public safety collaboration between the Centers for Disease Control and Prevention (CDC) and the High Intensity Drug Trafficking Areas (HIDTA) program, created to help local communities reduce drug overdoses and save lives by sharing timely data, pertinent intelligence, and innovative strategies.

The program is implemented by teams made up of Public Health Analysts (PHA) and Drug Intelligence Officers (DIO) who work together on drug overdose issues within and across sectors, states, and territories. PHA positions are funded by the CDC through the CDC Foundation, and DIO positions are funded by the Office of National Drug Control Policy (ONDCP) through the HIDTA program. These teams serve as the foundation of the ORS, creating opportunities across public health and public safety sectors to share data, insights and trends related to drug overdose in communities across the nation. They simultaneously promote public health and public safety efforts, which allows for a wide range of drug overdose issues to be addressed more effectively and efficiently. By doing so, the ORS is growing the body of evidence related to early warning signs and prevention strategies. With the information shared, and programs inspired by the ORS, the program is helping communities develop solutions to reduce overdoses and encouraging individuals to make healthier, safer choices.

The ORS employs Strategic Planning sessions led by Health Management Associates (HMA) to align partners, avoid duplication of efforts, and enhance state public health and safety activities to reduce overdose. Through this process, the HIDTA and Public Health partners work together to inform the development of an Action Plan which holds agreed upon strategies, objectives and key activities for each jurisdiction. As we work to expand the ORS program nationwide, there is a greater need for a more streamlined and effective program reporting system that allows us to capture the wide range of projects and activities being carried out by our ORS teams. Currently, the ORS has two independent work plans for the PHAs and DIOs, in the form of Excel macro-enabled workbooks, that are updated and submitted via email on a quarterly basis. This system results in duplicative work between the PHAs and DIOs, gaps in data collection and significant challenges in aggregating, reporting and visualizing the data. With the growing number of PHAs and DIOs, it is becoming increasingly difficult to clean and manage multiple disparate Excel files and deploy updates to the work plan templates and consolidated reporting tools.

ORS program leadership is seeking to develop a centralized reporting system to easily track and monitor PHA and DIO activities across the ORS network, allowing us to capture both their collaborative activities and successes, as well as independent activities, more accurately and efficiently. This new system should also allow the program to incorporate other data sources as part of the evaluation of the program, including annual survey data for ORS teams and partners, and program success stories.

A single reporting platform will provide a more holistic understanding of the collaborative impact of these teams in each state and territory, their work to support the agreed upon Action Plans, and ultimately, the impact and success of the overall program.

Ideally, this centralized reporting system will include the following features:

- Standardized program data collection with built-in quality control
- Ability to easily export/extract data
- Ability to store all program data in a single location
- Allow various levels of user access to data entry tool online with a single portal
- Secure data collection system that is user-friendly, web-based interface that is intuitive to use and improves the user experience
- Allow for custom, ad hoc reporting, data visualization and analysis
- Sustainability plan that provides official hand-off of admin rights and allows for ORS team to efficiently deploy updates, as needed.

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#### 4. SCOPE OF WORK

The purpose of this request for proposal (RFP) is to identify a contractor to propose a solution and create a centralized reporting system to track, monitor and store ORS projects and activities that support the ORS Team Action Plans, program success stories, annual survey data, and other program performance measures. This system should enable our PHAs and DIOs, core support staff, management team, executive leadership, and other key stakeholders across various organizations to locate information about the program in a centralized location, thus eliminating the need for multiple, separate reporting systems. Additionally, this system should

facilitate the generation of summary and ad hoc reports based on various performance measures. It is preferable that no additional software or hardware be required, and that the system is a simple, intuitive, web-based interface. Lastly, it is imperative the reporting tool is created with a sustainability plan in mind and provides the ORS Public Health and Public Safety Management Team with admin rights to efficiently deploy updates, as needed, in the future.

The contractor will be required to develop a technical training session to ensure full system education and operational capabilities for the ORS Public Health and Public Safety Management Team that will be managing, maintaining, and monitoring the centralized reporting system. This training should be accompanied by a PDF Operational and Maintenance Guide. The contractor will also be required to develop and conduct a live user training session to demonstrate how to access and use the reporting system to all ORS PHAs/DIOs, followed by a Q&A segment. This training session will be recorded to train future staff and should be accompanied by a PDF User Guide.

The activities involved include, but are not limited to, the following:

- Assess current program reporting system and data sources
- Identify and propose reporting solutions that would best meet the needs of the program
- Create a timeline and workflow process for the development and implementation of solution
- Develop and launch a centralized reporting system in close collaboration with selected members of the ORS Public Health and Public Safety Management Team and provide a transfer of admin rights towards the end of the contract
- Develop and conduct a technical training session(s) for selected members of the ORS Public Health and Public Safety Management Team, which should be accompanied by an Operational and Maintenance Guide
- Develop and conduct a live user training session for ORS PHAs/DIOs, which will be recorded and accompanied by a User Guide.

**Deliverables/Expectations:**

- A comprehensive centralized reporting system that meets the needs of the ORS program
- A technical training component and Operational and Maintenance Guide for the ORS Public Health and Public Safety Management Team
- A user training component, that will be recorded, and a User Guide to distribute to ORS PHAs and DIOs
- Bi-weekly meetings with selected members of the ORS Public Health and Public Safety Management Team
- Monthly progress reports
- Periodic detailed financial reports on expenditures.

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## **5. KEY REQUIREMENTS**

### **5.1. ELIGIBILITY**

Applicants must meet all the following requirements:

- Vendor status verification: U.S. System Award Management (SAM), or equivalent, search results for overall organization and individuals designated to this proposal.

Preferred qualifications:

- Experience in developing business intelligence solutions for multi-organizational programs (ideally in the public sector)
- Demonstrated experience of a reporting tool that is comprehensive, standardized and user friendly and preferably web-based with user portal entry
- Experience in sustainable hand-off by training a management team to maintain and update the reporting tool/system with a transfer of admin rights.

## **5.2. Funds Available**

CDC Foundation intends to award one contract for a four-month term (beginning November 2021 through the end of February 2022). However, the CDC Foundation may be flexible on these dates should the desired solution require more time. Bidders are requested to propose the best and most cost-effective solution to meet the RFP's requirements, while ensuring a high level of service.

The anticipated Maximum Payable Amount (MPA) for this contract is \$75,000. Bidders may propose a fee that exceeds the anticipated MPA if it is required to deliver its proposed solution for the scope of work. CDC Foundation will consider proposals meeting the proposal requirements from eligible bidders with a budget that exceeds the anticipated MPA.

The final award amount is contingent on submission of a detailed and reasonable budget to be approved by the CDC Foundation. CDC Foundation reserves the option to negotiate a best and final offer from bidders.

## **5.3. Funding Source**

The agreement resulting from this RFP will be supported by Federal funding under the *Capacity Building for Public Health Analysts in the Overdose Response Strategy* project via Cooperative Agreement number 6 NU38OT000288-03-01 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 award.

## **5.4. Place of Performance**

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

## **5.5. Performance Monitoring**

The performance will be monitored in line with the agreed project plan, monthly progress reports, detailed financial reports on expenditures and through scheduled bi-weekly check-

ins. The contractor will be expected to work in close collaboration and consultation with the CDC Foundation and the ORS Public Health and Public Safety Management Team working on this project. The plan for each deliverable will be an important part of the overall project plan.

## 5.6. Payment

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 the proposed fee structure (e.g., hourly rates, firm fixed price) in their proposal. CDC Foundation reserves the right to negotiate the fee structure.

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## 6. INSTRUCTIONS TO APPLICANTS

Applicants should follow the instructions set forth below in the submission of their proposal to the CDC Foundation.

**CDC Foundation will not be responsible for any proposal which does not follow the instructions in this RFP, and may, at its discretion, reject any such non-compliant proposal.**

### 6.1. Communications during the RFP Period

Applicants may submit questions ahead of time between October 4-10 by email. All questions are to be directed to the following e-mail address: [alahijani@cdcfoundation.org](mailto:alahijani@cdcfoundation.org). Please write "RFP: ORS Centralized Reporting System" in the Subject line. An RFP Supplement with a consolidation of responses to all questions asked by October 13, 2021 will be placed on our website and available on October 15, 2021.

### 6.2. Submission of Proposals

Please click the following link to complete the RFP by **5:00pm (ET) on November 8, 2021**. Submissions after this date and time may not be considered.

**RFP Link:** [CLICK TO SUBMIT APPLICATION](#)

**Proposal Requirements:** Proposal to be submitted in PDF Form and should be no more than 10 pages, single spaced, 11-point font, in English, and should address the following:

#### I. Applicant Experience and Capacity:

- Agency/contractor overview
- Description of previous experience in developing business intelligence solutions for multi-organizational programs (ideally in the public sector)
  - Provide at least two (2) client references related to this experience
  - Provide examples of demonstrated experience of a reporting tool that is comprehensive, standardized and user friendly.

**II. Proposal of Reporting Tool Solution for the ORS:**

- Proposal of Reporting Tool/System to meet the needs of the ORS program
  - Propose one to two (1-2) solutions that includes our ideal features listed in Section B for a centralized reporting system

**III. Budget:**

- Detailed budget and budget justification that demonstrates cost-effectiveness
- Compensation may be on a fixed fee basis, by deliverable/milestone or actual costs.
- Please include a justification that explains the rationale for the budget.
- If deliverable based, please ensure costs are delineated by deliverable.
- Where appropriate, further delineate cost of development and delivery.

**IV. Interest in Position**

- Description of interest and enthusiasm in this opportunity

**V. Submission of Proposal**

- Communication
- Visuals
- Organization

**Appendices** (not included in the 10-page total described above):

- Vendor status verification: U.S. System Award Management (SAM), or equivalent, search results for overall organization and individuals designated to this proposal.
- Description of yourself or team with Resumes and availability to start the project. (page limit: 2 pages per principal/expert).

***Submitting a Proposal***

Application materials should be submitted by **5:00pm ET on Monday November 8, 2021.**

Proposals will not be accepted after this date and time.

**Proposals must be submitted electronically.**

**[CLICK TO SUBMIT APPLICATION](#)**

**We recommend you begin to submit your proposal by 11:00 am ET to allow sufficient time to address any unexpected technical issues.**

**6.3. Timeline**

Date	Description
October 4, 2021	RFP Release
October 28, 2021	Question Submission Deadline
November 1, 2021	RFP Supplement Release

<b>November 8, 2021, 5:00pm ET</b>	Proposal Submission Deadline
<b>November 15-17, 2021</b>	Interview (subject to change based on need)
<b>Late November 2021*</b>	Anticipated Selection Notification
<b>Early December 2021</b>	Contract Execution
<b>February 21, 2022**</b>	Centralized Reporting System Technical Training for the ORS Public Health and Public Safety Management Team, which should include an Operational and Maintenance Guide
<b>February 28, 2022**</b>	Centralized Reporting System User Training for ORS PHAs and DIOs, which should include a User Guide
<b>March 7, 2022**</b>	Centralized Reporting System official launch

\* The CDC Foundation will notify the candidate directly if they are selected.

\*\* These are preferred dates based on the first quarterly report being due April 15, 2022. However, the CDC Foundation may be flexible on these dates should the desired solution require more time.

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## 7. SELECTION PROCESS AND REVIEW CRITERIA

The CDC Foundation will award grants to applicants based on the following multi-stage review process outlined below.

### Level 1 Internal Review:

CDC Foundation will evaluate all applicants for completeness and minimum requirements. Basic requirements include timely receipt of 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 subrecipient monitoring, per program year. Further written materials to assess risk may be requested during or prior to the review.

### Level 2 External Review:

Applicants that pass Level 1 review will proceed to Level 2 review. A panel of three independent reviewers with evaluation and subject matter expertise will review and



score written proposals. Reviewers will score applicants in accordance with review criteria listed below. The highest scoring applicants will proceed to Level 3 Review.

The following table outlines the criteria that reviewers will use to guide their evaluation of each written proposal.

<b>Category (Weight)</b>	<b>Considerations</b>	<b>Total Weight Percentage by Category</b>
Technical Experience  *References will be considered	<ul style="list-style-type: none"> <li>• Experience creating a multi-organization reporting tool that is comprehensive, standardized, user friendly and <u>preferably</u> web-based with user portal entry</li> <li>• Experience in sustainable hand-off by training a management team to maintain and update the reporting tool/system</li> <li>• Experience working in public sector on program evaluation</li> </ul>	40%
Proposal of Reporting Tool Solution for the ORS	<ul style="list-style-type: none"> <li>• Standardized data collection with built-in quality control</li> <li>• Ability to export/extract data easily</li> <li>• Secure data collection system that is user friendly, web-based interface with user portal entry</li> <li>• Allow for custom, ad hoc reporting, data visualization and analysis</li> <li>• Sustainability of reporting tool</li> </ul>	20%
Budget	<ul style="list-style-type: none"> <li>• Cost-effectiveness</li> <li>• Detailed budget justification</li> </ul>	20%
Interest in position	<ul style="list-style-type: none"> <li>• Interest and enthusiasm in this opportunity</li> </ul>	10%
Submission of proposal	<ul style="list-style-type: none"> <li>• Communication</li> <li>• Visuals</li> <li>• Organization</li> </ul>	10%
<b>Total</b>		<b>100%</b>

Level 3 Interview (subject to change based on need):

The highest scoring applicants from the Level 2 Review may be invited for an interview. Only key personnel on the proposed RFP must attend the interview. The interview will provide an opportunity for reviewers and finalists to address any follow-up or clarifying questions. Content of the interview may be used to inform final award decisions.

The selected applicant will receive a notification that their proposal was selected for funding. The CDC Foundation may not provide scores or specific review feedback to unsuccessful applicants.

Attachments:

1. Excel Budget Template

2. Budget Narrative Template
3. Budget Preparation Guidelines