



Heluna Health

**Request for Proposal
for
Development of Plan for Data and Work Flows for the
Enterprise Reporting Project**

Proposal Deadline: July 22, 2022

Public Health Foundation Enterprises, Inc. dba
Heluna Health
On behalf of
California Department of Public Health (CDPH)

HELUNA HEALTH
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City of Industry, CA 91746
www.HelunaHealth.org



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Request for Proposal – Design and Development of CBDMP Enterprise Reporting Project

KEY DATES SCHEDULE

ISSUANCE OF RFP:.....July 1, 2022

CONSULTANT QUESTIONS ON RFPJuly 15, 2022 by 5:00 PM PST

PROPOSAL SUBMITTAL DEADLINEJuly 22, 2022 by 8:00 PM PST

FINAL SELECTION BY:.....July 29, 2022

DELIVERY LOCATION of Proposal:

Electronic Submissions Only Including Application Narrative and Budget
Send to Aaric Haley: Email: AHaley@helunahealth.org
Subject Line: Company/Person Name - RFP for CBDMP Enterprise Reporting Project

ANTICIPATED TERM OF SERVICE/AFTER-ACTION PROJECT:
 Upon execution of contract to September 26, 2022, with extension of time and activities if funding is available

NOTICE: ALL QUESTIONS RELATED TO THIS RFP ARE TO BE DIRECTED TO Aaric Haley via E-MAIL at AHaley@helunahealth.org no later than July 15, 2022 by 5:00 PM PST. Questions will only be accepted via email. NO PHONE CALLS PLEASE

Once the Contractor’s application has been reviewed and approved, HELUNA HEALTH will draft and send a contract encompassing required activities and approved funding.

Additional documents may be required to establish the contractual agreement.



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Introduction and Background:

Background:

Heluna Health has partnered with the California Department of Public Health, California Birth Defects Monitoring Program (CDPH, CBDMP) in creating an enterprise-level data reporting portal.

The goal of the project is to replace existing application-level reports to provide CBDMP staff and management with a unified and clear view of the status and progress of case identification, medical record review, case coding, classification, and workload management of cases eligible for birth defects registry and Surveillance for Emerging Threats to Mothers and Babies Network (SET-NET).

Purpose, Goals and Objectives:

Purpose:

The purpose of this solicitation is for HELUNA HEALTH, on behalf of the California Department of Public Health (CDPH) to solicit proposals from qualified contractors to award a contract for design, development, and implementation for the CBDMP Enterprise Reporting Project.

Goals and Objectives:

HELUNA HEALTH on behalf of CDPH seeks a contractor with capabilities including, but not limited to:

- Practical experience in creating a reporting portal using SQL Server Reporting Services, Microsoft Power BI, or a comparable platform approved by CDPH IT, and converting existing reports from Crystal Reports
- Expertise in designing reports with visually appealing and informative data representation
- Ability to interview stakeholders and incorporate their input and feedback into the finished product
- Experience working with relational data in SQL Server, including writing queries and modifying existing scripts and stored procedures
- Experience in integrating reports with web-based and Windows applications in the .NET platform
- Knowledge of modern cloud security and data protection processes, including processes to protect sensitive or confidential information.



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- Knowledge and experience with web-based meetings (e.g., ZOOM, Microsoft Teams, WebEx) and/or teleconference.
 - Due to social distancing and telework conditions resulting from the SARS-CoV-2 virus, the State of CA partners and other project stakeholders will be relying on online collaboration platforms to host the meetings required to conduct and guide this project.

Scope of Work and Budget:

Service Overview:

The contractor agrees to provide HELUNA HEALTH/CDPH California Birth Defects Monitoring Program the services described herein.

This project will be conducted during the period, from date of contract execution through September 26, 2022 with extension of time and activities if funding is available.

Services to be Performed:

1. The goal of this project is to replace existing application-based reports with an enterprise reporting portal to provide CBDMP staff and managers with insights into the status and progress of birth defects and SET-NET data collection, coding, case review and classification, and produce documents such as abstract reports and chart request lists that can be shared with researchers and outside partners
2. The contractor will achieve this by:
 - 2.1. Designing and developing interactive, browser-based reporting portal to replace existing application-level reports as well as proposing and designing new reports
 - 2.2. Designing, implementing, testing, and transferring knowledge of the work and the code base to the State of CA team
3. The contractor will be measured for success by evaluating the developed solution to ensure it meets the needs of CBDMP staff and management for birth defects and SET-NET data collection and review. Additional criteria for success include:
 - 3.1. Understanding and identifying CBDMP data reporting needs
 - 3.2. Producing interactive reports and data visualizations based on the organized and stored data via Maps, Dashboards, and SQL queries
 - 3.3. Providing user and technical documentation
4. Contract may be extended, and additional phases included based on performance and funds availability



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Therefore, the contractor will:

5. **Phase 1:** The contractor shall deliver a plan that includes, at a minimum, the following:
 - 5.1. Proposal for centralized reporting solution, including reports, maps, and dashboards
 - 5.2. Requirement documents based on meeting with the stakeholders
 - 5.3. A project roadmap and timeline to maintain development pace and establish project milestones
 - 5.4. Code repository to hold the codebase and project documentation using Team Foundation Version Control (TFVC)
 - 5.5. Prior to work on Phase 2, hold a meeting with the CBDMP team to evaluate Phase 1 success criteria.

6. **Phase 2:** the contractor shall deliver the following:
 - 6.1. Developed solution and codebase for web-based data collection reports integrated with the existing CBDMP report portal and accessible through the data collection application, including but not limited to
 - 6.1.1. Medical record abstract detail, both with and without identifiers
 - 6.1.2. Medical record request list
 - 6.1.3. Caseload report for individual medical record abstractors
 - 6.1.4. Workload status reports and charts as defined by the stakeholders in Phase 1
 - 6.2. Interactive filter and sorting options
 - 6.3. Ability to export reports into other formats such as PDF and RTF
 - 6.4. The solution will include
 - 6.4.1. Report layouts
 - 6.4.2. Presentation layer for dashboards and interactive report filtering and sorting
 - 6.4.3. SQL scripts
 - 6.4.4. Technical and user documentation
 - 6.5. Prior to completion of contract the contractor shall hold a meeting with the State of CA team to:
 - 6.5.1. Evaluate Phase 2 success criteria and receive comment
 - 6.5.2. Transfer knowledge of the solution design, functionality, management, security, and other important aspects of the solution to the State of CA team
 - 6.5.3. Deliver a Maintenance and Enhancement Recommendation Report and presentation so the solution can be sustainably managed and continually improved

7. In addition to the requirements above, the contractor shall also do the following:
 - 7.1. Establish a detailed understanding and identification of data reporting needs



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- 7.2. Ensure the data reporting is accessible to and ready for use by CBDMP staff and management.
- 7.3. Provide training and technical assistance on use of this system to CBDMP staff
8. Contractor is encouraged to add services to enhance the project. It is expected that the contractor will address all of the elements listed

Service Location:

The services rendered will be performed offsite.

Service Hours:

The services shall be provided during normal working hours, 8:00 a.m. to 5:00 p.m., Monday through Friday unless agreed upon by CDPH and contractor.

Budget:

HELUNA HEALTH anticipates entering into an hourly/deliverable-based contract with the selected contractor. The budget amount for the period of the contract term is not to exceed an all-inclusive amount of **\$55,000**.

Reporting:

Progress Reports:

Contractor must submit progress reports and meet with the CBDMP staff on a weekly basis and as requested. The weekly reports shall detail the work performed and the goals accomplished. The report shall clearly identify completed tasks and provide information related to weekly activities. The CBDMP project manager may request that additional details be included in the report.

Estimated Timeline

Activity	Estimated Timeline
Release of RFP	July 1, 2022
Contractor questions on RFP	July 15, 2022 by 5:00 PM PST
Proposals due from contractor	July 22, 2022 by 8 PM PST
Award to selected contractor	July 29, 2022
Contract executed	August 5, 2022
Kick off meeting with CDPH, partners, and contractor	August 6, 2022
Phase 1: Contractor provides draft plan	August 15, 2022
Phase 2: Contractor finalizes plan, implements plans, and provides training.	September 26, 2022



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Proposal Requirements-Instructions:

All proposers must provide the following as part of their proposal:

- (1) Title Page/Cover Letter:** Include you or your company's name, address, web site, telephone number, and primary contact person with e-mail, direct line and mobile phone numbers. The title page will be considered a cover letter, and should be signed by an agent, owner or authorized officer of your company. **Maximum of 1 page in length.**
- (2) Statement of Qualifications:** All responses must include a statement of qualifications, experience and description of the respondent individual or firm and your/its history. The response should specifically indicate you or your firm's current and historical expertise in providing services identified in this RFP. **Maximum of 4 pages in length.**
- (3) Technical Solution:** The Respondent shall demonstrate and describe the firm's or group's ability to accomplish the project, based on the requirements in the Statement of Work. Our ability to interpret and evaluate your ability to perform the project will factor into our decisions. The information must be stated in the budget, including justification and qualifications. **Maximum of 3 pages in length.**
- (4) Past Performance/References:** All responses must include references from at least 3 clients, preferably clients who have utilized the contractor within the last three years. **Maximum of 3 pages in length.**
- (5) Billing Rates and Structure:** HELUNA HEALTH anticipates entering into an Hourly/Deliverables-Based with selected firm or group not to exceed an all-inclusive amount of \$55,000. **Maximum of 3 pages in length**
- (6) Documents to include with application:**
 - Completed and signed W9 <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
 - Proof of General Liability Insurance Certificate
 - Business License

Contractor Questions on RFP

Contractor questions about the RFP must be submitted to Heluna Health no later than **July 15, 2022 by 5:00 PM PST**. Questions will only be accepted via email and should be submitted to Aaric Haley at AHaley@helunahealth.org.