

**Request for Resume (RFR)
CATS+ Master Contract
All Master Contract Provisions Apply**

Section 1 – General Information			
RFR Number: (Reference BPO Number)	M00B7400635		
Functional Area (Enter One Only)	Functional Area 10 - IT Management Consulting Services		
Labor Category/s			
<i>A single support staff or support groups of up to five members may be engaged for up to six months without renewal options. Awards for Major IT Development Project (MITDP)/Program Manager/Deputy PMs may have tenure of one base year with up to two optional years, or through the end of the project within the Master Contract term. An RFR is limited to only labor categories defined in the CATS+ RFP.</i>			
Enter the labor category/s to be provided:			
1. Subject Matter Expert			
Anticipated Start Date	May 22, 2017		
Duration of Assignment	Up to six (6) months		
Designated Small Business Reserve? (SBR): (Enter "Yes" or "No")	Yes		
MBE Goal, if applicable			N/A
Issue Date:	04/07/2017	Due Date:	04/28/2017
		<small>mm/dd/yyyy</small>	
		Time (EST):	02:00 pm Local Time
		<small>00:00 am/pm</small>	
Place of Performance:	Department of Health and Mental Hygiene (DHMH) Office of Information Technology - Applications Division 201 W. Preston St. Baltimore, MD 21201		
Special Instructions: (e.g. interview information, attachments, etc.)	<p>In the event that more than five (5) qualified proposals are received, the Procurement Officer may elect to follow a down-select process per the following guidelines.</p> <p>The Procurement Officer will notify the Offeror at time of scheduling initial interviews whether subsequent rounds of interviews are required. When used, the down-select procedures to be followed by the Procurement Officer are as follows:</p> <p>1. An initial interview will be performed for all proposals meeting minimum requirements.</p>		

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	<p>2. A technical ranking will be performed for all proposals based on the initial interview. Proposals will be ranked from highest to lowest for technical merit based on the quality of the proposals submitted and interview results.</p> <p>3. The top five (5) proposals identified by the technical ranking will be notified of additional interviews.</p> <ul style="list-style-type: none"> • All proposals must be in a PDF format that can be scanned for keywords, do not submit proposals as a PDF image. • Each cell (Education, Mandatory General Experience, Mandatory Specialized Experience, and Preferred Experience) in LABOR CATEGORY PERSONNEL RESUME SUMMARY (ATTACHMENT 1 CONTINUED) Must be filled in, <u>with specifics</u>; if a candidate does not have the experience, enter N/A in the cell. • All proposal must have the Experience Checklist (Attachment 3) completed with Begin and End Dates in the MM/DD/YYYY format. An embedded formula will automatically calculate the "Experience Days". 		
Security Requirements (if applicable):	Candidates will be issued a temporary ID badge after showing proof of identification. (e.g., driver's license)		
Special Invoicing Instructions:	Payments will be monthly upon receipt of invoices and supporting documentation.		
Section 2 – Agency Procurement Officer (PO) Information			
Agency / Division Name:	Department of Health and Mental Hygiene (DHMH) / Office of Procurement and Support Services (OPASS)		
Agency PO Name:	John Gullucci	Agency PO Phone Number:	410-767-5823
Agency PO Email Address:	John.gullucci@maryland.gov	Agency PO Fax:	410-333-5958
Agency PO Mailing Address:	DHMH-OPASS, 201 W Preston Street, RM 416, Baltimore, MD 21201		

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Section 3 – Scope of Work

Agency / Project Background

The objective of this RFR is to obtain one (1) qualified subject matter expert (SME) for development of a strategy for business intelligence (BI) and public health informatics (PHI). The BI / PHI strategy is in context of a potential new Electronic Health/Medical Record (EHR) system for State agencies that operate facilities delivering healthcare services. The BI / PHI strategy will consist of an assessment of needs; an inventory of existing technologies and capabilities in State agencies; the identification of leading technologies and platforms available in the marketplace, including a request-for-information (RFI) process; the identification and documentation of "success stories" in other States; and the recommendation of leading practices for data quality and data governance. The SME will need to demonstrate previous experience in performing this kind of analysis and developing these kinds of recommendations within the BI / PHI domain.

The primary agencies developing this BI / PHI strategy are the Department of Health and Mental Hygiene (DHMH) and the Department of Public Safety and Corrections (DPSCS). The SME will be a key member of a BI / PHI team composed of representatives from these two agencies and selected other agencies. The BI / PHI team will be coordinated and managed by a DHMH Manager .

The mission of DHMH is to protect the public's health. For which, DHMH operates twelve hospital facilities and administers dozens of public health programs. These facilities and programs rely on a broad range of IT systems for their enablement. The vision for the facilities is to retire the legacy mainframe system and migrate to a modern EHR system, the strategy for which is being developed by contractors under separate RFRs. The vision for the dozens of applications in the public-health administrations is to generate actionable insight from the broad array of legacy systems, the BI / PHI strategy for which is to be developed by the SME secured under this RFR. -

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Job Description/s	
Labor Category/s (From Section 1 Above)	Duties / Responsibilities
<i>Subject Matter Expert</i>	Job duties and responsibilities listed below
<p>Duties/Responsibilities: The SME for a BI / PHI Strategy will bring experience and expertise in:</p> <ul style="list-style-type: none"> • Definition of requirements and workflows relating to BI / PHI systems, with prior experience in the public-health domain; • Recommendation, evaluation, and/or selection of BI / PHI systems for implementation and integration; • Implementation and support of a modern BI / PHI platform, including comfort with technical activities and decision points; • Design and operation of governance models for data quality and data sharing; and • Presentations and recommendations for executive-level decision-makers. <p>For the project planned under this RFR, the SME will:</p> <ul style="list-style-type: none"> • Analyze existing BI / PHI platforms and capabilities at DHMH and DPSCS, plus those of other organizations as may be decided by the project's executive sponsors; • Perform marketplace research, possibly including collaboration with the DHMH Manager in development, issuance, and summary of an RFI to be distributed to selected vendors; • Be responsible for the BI / PHI content in the project deliverables in Appendix A; • • Develop trusted-advisor relationships with senior stakeholders at DHMH, DPSCS, and other selected agencies; • Demonstrate clarity, brevity, and courtesy in written and verbal communications; and • Respond to requests from the project executive sponsors, who are the CIOs of DHMH and DPSCS, as reasonably requested in relation to the deliverables and activities for this project. <p>The SME will be located primarily at the DHMH headquarters in downtown Baltimore and will visit other State facilities and offices as appropriate.</p>	

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Minimum Qualifications

For minimum qualifications, see the labor category description in the CATS+ RFP for the subject RFR labor category. In addition, qualified candidates must meet the minimum qualifications specified below. **Candidates that do not meet minimum qualifications will be deemed not reasonably susceptible for award and will not progress to full evaluation.**

Labor Category/s (From Section 1 Above)	Minimum Qualifications
a) Subject Matter Expert	<p>Education: A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline</p> <p>General Experience:</p> <p>Must have seven (7) years of experience in the IT field.</p> <p>Specialized Experience:</p> <ul style="list-style-type: none"> a) At least five (5) years of experience relating to selection, implementation, enhancement, support, and/or governance of BI / PHI systems that produce actionable insight from health-related data or can demonstrate five (5) years' experience of similar experience of size and like scope. b) Demonstrated experience and comfort with BI / PHI technical development and skills. (Note: This RFR is <i>not</i> for a technical-development role. It is for a strategy-and-planning role. But demonstrable technical-development skills in the BI / PHI domain are necessary.) c) Demonstrated experience at engaging with senior stakeholders to promote understanding and facilitate decisions relating to BI / PHI systems. d) Demonstrated ability to work across multiple organizations. e) Demonstrated excellence at preparing written documents and presentations.

Preferred Qualifications

The additional Experience/Knowledge/Skills listed below are preferred by the State.

b) Subject Matter Expert	<p>Education: Preferred to have a relevant Master's Degree in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline.</p> <p>General Experience:</p> <ul style="list-style-type: none"> a) Demonstrated four (4) years or more of experience in leadership of BI / PHI systems, for example as a Director of Analytics, Data Quality Lead, Senior PHI Analyst, etc. b) Demonstrated experience with two or more procurements and implementations relating to BI / PHI systems. c) Demonstrated experience in some or all of the following areas:
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	<ol style="list-style-type: none"> 1) Strategies for achieving effective data acquisition, interchange, management, quality, storage, and insight to address population health needs, with special emphasis on defining standards, enabling interchange, and delivering insight. 2) Applicable laws, statues, and policies regarding health information including security, privacy, and management of confidential data. 3) Applicable healthcare and public health standards, message formats, and transport mechanisms. 4) Statistical analysis and business analysis. 5) Business operations, methods, and practices. 6) Database and data warehouse development, use, and management. 7) Data collection and use methodologies, including survey research, registry operations, usability studies, focus groups, and interview data collection and analysis 8) Data interchange methodologies and technologies.
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Section 4 - Required Submissions

NOTE:

- Master Contractors may propose up to two (2) candidates for each position requested.
- Master Contractors electing not to propose in response to the RFR must submit a "Master Contractor Feedback Form" via the "Master Contractor Login" on the CATS+ web site.
- Master Contractors proposing in response to the RFR must submit the documents below as separate files contained in two separate emails as follows:

Email 1 of 2 with "Technical": Master Contractor Name, RFR number, & candidate name in the subject line

- Resume for each labor category described in the RFR (Attachment 1)
- Three (3) current references that can be contacted for performance verification of the submitted consultant's work experience and skills. Telephone number and email address of reference is needed.
- Copies of educational/training and professional certifications
- Company references

Email 2 of 2 with "Financial": Master Contractor Name, RFR number, & candidate name in the subject line

- Price Proposal (Attachment 2)
- Conflict of Interest Affidavit (Attachment G in the CATS+ RFP)
- Living Wage Affidavit (Attachment I in the CATS+ RFP)

Section 5 – Evaluation Criteria

Candidates meeting the **Minimum Qualifications** listed **in Section 3 above** will be evaluated for overall best value, as follows:

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1. Details provided in LABOR CATEGORY PERSONNEL RESUME SUMMARY (ATTACHMENT 1 CONTINUED)
2. Preferred Qualifications
3. Interview
4. References
5. Price

Basis for Award Recommendation

The Agency PO will recommend award to the Master Contractor whose proposal is determined to be the most advantageous to the State, considering price and the evaluation factors set forth in the RFR. The Agency PO will initiate and deliver a Task Order Agreement to the selected Master Contractor. **State law regarding conflict of interest may prevent the selected Master Contractor for this RFR future participation in procurements related to this RFR's Scope of Work, depending upon specific circumstances.**

**Request for Resume (RFR)
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ATTACHMENT 1
RFR RESUME FORM**

RFR #

Instructions: Enter resume information in the fields below; do not submit other resume formats. Submit only one resume per Labor Category described in Section 1 of the RFR. If the RFR requests multiple Labor Categories, use a separate resume form for each proposed candidate.

Labor Category: *Subject Matter Expert*

Candidate Name:

Master Contractor:

A. Education / Training

Institution Name / City / State	Degree / Certification	Year Completed	Field Of Study
<add lines as needed>			

B. Relevant Work Experience

Describe work experience relevant to the Duties / Responsibilities and Minimum Experience / Knowledge / Skill described in Section 3 of the RFR. Starts with the most recent experience first; do not include non-relevant experience.

<p>[Organization] <i>Description of Work...</i> [Title / Role] [Period of Employment / Work] [Location] [Contact Person (Optional if current employer)]</p>	
<p>[Organization] <i>Description of Work...</i> [Title / Role] [Period of Employment / Work] [Location] [Contact Person]</p>	
<add lines as needed>	

C. Employment History

List employment history, starting with the most recent employment first

Start and End Dates	Job Title or Position	Organization Name	Reason for Leaving
<add lines as needed>			

D. References

List persons the State may contact as employment references

Reference Name	Job Title or Position	Organization Name	Telephone / Email
<add lines as needed>			

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LABOR CATEGORY PERSONNEL RESUME SUMMARY
(ATTACHMENT 1 CONTINUED)

**Candidate Relevant Experience" section must be filled out. Do not enter "see resume" as a response.

Proposed Individual's Name/Company:	How does the proposed individual meet each requirement?
LABOR CATEGORY TITLE – Subject Matter Expert	
Requirement	Candidate Relevant Experience *
Education:	Education:
A Bachelor's Degree from an accredited college or university with a major in Computer Science, Information Systems, Engineering, Business, or other related scientific or technical discipline	
Mandatory General Experience:	Mandatory General Experience:
Must have seven (7) years of experience in the IT field.	
Mandatory Specialized Experience:	Mandatory Specialized Experience:
a) At least five (5) years of experience relating to selection, implementation, enhancement, support, and/or governance of BI / PHI systems that produce actionable insight from health-related data or can demonstrate five (5) years' experience of similar size and like scope.	
b) Demonstrated experience and comfort with BI / PHI technical development and skills. (Note: This RFR is not for a technical-development role. It is for a strategy-and-planning role. But demonstrable technical-development skills in the BI / PHI domain are necessary.)	
c) Demonstrated experience at engaging with senior stakeholders to promote understanding and facilitate decisions relating to BI / PHI systems.	
d) Demonstrated ability to work across multiple organizations.	

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e) Demonstrated excellence at preparing written documents and presentations.	
Preferred Experience:	Preferred Experience:
a) Demonstrated four (4) years or more of experience in leadership of BI / PHI systems, for example as a Director of Analytics, Data Quality Lead, Senior PHI Analyst, etc.	
b) Demonstrated experience with TWO or more procurements and implementations relating to BI / PHI systems:	
First procurement and implementation relating to a BI / PHI system	
Second procurement and implementation relating to a BI / PHI system	
c) Demonstrated experience in some or all of the following eight (8) areas:	
1) Strategies for achieving effective data acquisition, interchange, management, quality, storage, and insight to address population health needs, with special emphasis on defining standards, enabling interchange, and delivering insight.	
2) Applicable laws, statues, and policies regarding health information including security, privacy, and management of confidential data.	
3) Applicable healthcare and public health standards, message formats, and transport mechanisms.	
4) Statistical analysis and business analysis.	
5) Business operations, methods, and practices.	
6) Database and data warehouse development, use, and management.	
7) Data collection and use methodologies, including survey research, registry operations, usability studies, focus groups, and interview data collection and analysis	
8) Data interchange methodologies and technologies	

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The information provided on this form for this labor category is true and correct to the best of my knowledge:

Master Contractor Representative:

Print Name

Signature

Date

Proposed Individual:

Signature

Date

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**ATTACHMENT 2
PRICE PROPOSAL**

RFR # MOOB5400254

(This form is to be filled out by Master Contractors - Submit with the Financial Response)

Subject Matter Expert	A	C	D
	Fully Loaded Hourly Labor Rate	Evaluation Hours	Evaluation Price (A x C)
(Enter the proposed resource name)	\$	1000	\$

Authorized Individual Name

Company Name

Title

Company Tax ID #

The Hourly Labor Rate cannot exceed the Master Contract rate, but may be lower. Proposed rates must be fully loaded, all inclusive, and shall include all direct and indirect costs for the Master Contractor to perform under the TOA. Evaluation Hours are for evaluation purposes only and do not represent actual hours to be worked or invoiced.

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Appendix A

Subject Matter Expert TASKS

1. Engage in an accelerated "discovery" process to become familiar with existing analyses, existing systems, past procurements, organizational structures, and procurement processes.
2. Be responsible for BI / PHI content in the following project deliverables:
 - a. Requirements Document: Collection, refinement, organization, assessment, reconciliation, and prioritization of BI / PHI requirements within DHMH, DPSCS, and other designated agencies, if any.
 - b. BI / PHI Assets Inventory: Identification of personnel, technologies, and platforms within DHMH, DPSCS, and other designated agencies for purposes of BI / PHI.
 - c. Information Use Cases: Development of information use cases to promote the definition and understanding of both the requirements for and the value from a BI / PHI system.
 - d. RFI Document: Preparation and distribution of an RFI document in accordance with approved templates and procedures relating to State procurements.
 - e. RFI Findings Document: Organization of the results of the RFI process, including the results of marketplace research, into a single document that includes an executive summary. This document shall not contain recommendations regarding particular vendor solutions.
 - f. Success Stories: Documentation of "success stories" relating to BI / PHI in States other than Maryland, with an emphasis on leading practices for human capital and organizational structure.
 - g. Recommendations for Data Quality and Governance: Development of recommendations specific to DHMH and the State of Maryland for sharing, protecting, and leveraging data related to public health.
3. Develop the foregoing deliverables by engaging stakeholders, going through iterations, and responding to requests from the DHMH Manager and Executive Sponsors.
4. Perform site visits to build relationships and develop understanding of requirements.
5. Collaborate effectively with all project stakeholders and sponsors, including the DHMH Manager.
6. Escalate issues expeditiously and appropriately.
7. Conduct all meetings and workshops with advance preparation and due professionalism.
8. Demonstrate clarity, brevity, and courtesy in all written communications, deliverables, and reports.
9. Adhere to guidelines, procedures, and requirements relating to State procurements and ethics.