

Data Dashboards for the Public Health Workforce Interests and Needs Survey (PH WINS)

REQUEST FOR PROPOSALS

Proposals Due: 12/22/23

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THE OPPORTUNITY

The Vose River Charitable Fund (VRCF) is seeking a contractor or team of contractors with expertise in data visualization, web design, and data analysis and processing to enhance and modernize the existing Public Health Workforce Interests and Needs Survey (PH WINS) Data Dashboards. This re-build of the dashboards will aim to provide users with a more customized experience when exploring the PH WINS data, which is currently only available with one graph-type and one-way filter options. Additionally, enhancements will respond to the needs and feedback of current users, incorporate new features, and support the addition of PH WINS 2024 and 2027 data.

This work will result in the creation of two types of dashboards: publicly available dashboards that display national data and password-protected dashboards for agency-specific data.

The published national dashboards can be found at www.phwins.org/national.

ABOUT THE VOSE RIVER CHARITABLE FUND

VRCF promotes public health in the United States by developing tools and collaborations with other nonprofits and governmental health departments to support effective policies and the public health workforce. Certain VRCF activities were begun as programs of the de Beaumont Foundation (“de Beaumont”), a private foundation recognized as tax-exempt under I.R.C. section 501(c)(3). de Beaumont now provides staff time to VRCF to continue the programs there. These programs were operated by de Beaumont, with funding from de Beaumont and a variety of other sources. PH WINS is an example of a key de Beaumont project that is administered through VRCF.

ABOUT THE PUBLIC HEALTH WORKFORCE INTERESTS AND NEEDS SURVEY (PH WINS)

PH WINS is the first and only survey of its kind, collecting the perspectives of individuals working in state and local governmental public health departments across the nation. PH WINS was first launched in 2014 and has been repeated in 2017 and 2021. The survey is planned to be conducted again in 2024 and 2027. There are other workplace surveys of the public health

workforce, however, those surveys are typically focused on a specific job type or program area in the workforce, or a single survey is completed by leadership for the entire department. PH WINS collects the following information from individual employees in state and local health departments: workplace engagement, satisfaction, intention to leave, mental and emotional well-being, training needs, ability to address pressing public health issues, and demographic characteristics of workers. For information on how the survey questions have changed overtime, please read the [PH WINS 2021 methodology paper](#).

The most recent administration of the survey, PH WINS 2021, was conducted between September 2021 and January 2022. It was sent to approximately 130,000 individuals and received approximately 45,000 responses. The survey included the entire staff of 47 state health agencies and 288 autonomous local health departments. For the first time, through a partnership with the Regions V and X Public Health Training Centers, PH WINS 2021 included small local health departments, departments with a staff size of fewer than 25 and serving a population of less than 25,000, from both regions. The inclusion of these health departments increased the local health department sample size by 400%. The goal is to partner with all ten Public Health Training Centers (based on the 10 Health and Human Services regions) for PH WINS 2024, which will greatly increase the local health department sample size.

The PH WINS Data Visualization Dashboards

After nearly two years of research and development, the Foundation launched the PH WINS Data Visualization Dashboards (“dashboards”) in August 2022. The aim of the dashboards is to provide the public health community and participating health departments with an intuitive way to access and understand PH WINS data to drive action nationally and within the health department.

There are two types of dashboards: national-level dashboards and agency-specific dashboards. The national-level dashboards are publicly available and provide nationally representative data, as well as data by specific settings (state health agencies, big city agencies, and other local health departments), Health and Human Services (HHS) region, and thirteen specific job types or program areas in the workforce. The agency-specific dashboards provide almost the same data as the national-level dashboards but are password-protected and specific to each agency that met the criteria to receive their own data back. The national dashboards can be accessed at www.phwins.org/national. Due to data sharing requirements, we cannot provide access to the agency dashboards at this time.

The national dashboards include data on 7 topics: engagement & satisfaction; staying & leaving; training needs; well-being; health equity concepts; demographics; and workforce characteristics. The agency-specific dashboards include the same topics except for health equity concepts. Agency specific dashboards were created for 312 agencies that participated in 2021. An additional 39 dashboards were created for participants in a special administration of PH WINS in 2022.

The main features of the current (agency and national) dashboards include:

- Visualization of data in graph format with hover over tooltips
- Trend data from PH WINS 2017 when available
- Filter, sort, and comparison options
- Downloadable graph images
- Downloadable graph data
- Resource links to relevant websites and static resource documents.

The current dashboards are built using custom code. During research and development, existing data visualization products such as Tableau and RStudio Shiny were explored. However, custom code was selected due to the complex nature of the data and data protection requirements for the agency-specific dashboards. Data for the dashboards was pre-processed to reduce load times. Users for the agency-specific dashboards are managed by the Foundation using Auth0 – there are 1,000 users, not all are active. Bidders should plan to maintain the server, handle hosting and maintenance of the dashboard website, authentication system, and back-end management system.

The dashboard users vary widely and include the public, academic researchers, media, and all levels of health agency staff. PH WINS data are used frequently by agency staff for workforce development planning, agency certification requirements, training need identification, and succession planning. Dashboard users utilize and download data from the dashboards in multiple formats (PowerPoint, PDF, Excel, PNG) to support their work. Therefore, the final PH WINS 2024 dashboard product should serve the needs of both data-savvy and less technical audiences through a clean, intuitive, accessible user interface.

SCOPE OF WORK

PH WINS 2024 Dashboard Build

For this scope of work, the Foundation has identified the following steps and proposed timeline. Bidders should provide an explanation if they choose to adjust the timeline in the final proposal. See the **Timeline & Budget** section below for a list of key PH WINS 2024 dates.

1. Review of Current Dashboards and Recommendations for Enhancements (completed by June 2024) – this portion of the scope of work should outline how the bidder intends to review the current dashboards and propose enhancements in look, feel, and features. Note that in Fall 2023, focus groups were conducted with dashboard “super-users” to understand the strengths and gaps of the existing dashboards. Once the results of these focus groups are complete, they can be shared. However, this may not be before the final proposal is due.
 - a. *Suppression Rules:* It is of the utmost importance to protect the confidentiality of individual agencies and confidentiality and anonymity of individual respondents. The PH WINS 2021 dashboards currently include rules that suppress graphs if a single row in the graph had less than 10 respondents. A full review of these rules should be conducted during this stage of the scope of work.

2. Identify Design and Data Requirements (completed by June 2024) – in order for this project to be successful, both design and data requirements will need to be determined. This portion of the scope of work should discuss how the contractor intends to define the requirements.
3. Development – the dashboard build is intended to occur in three parts.
 - a. Part I: Dummy Dashboards (completed by January 2025) – using information gathered from steps 1 and 2 of this scope of work build the dashboards based on existing data and substituting dummy data for PH WINS 2024.
 - b. Part II: Dummy Data Analysis and Processing (completed by January 2025 – concurrently with Part I) - develop and create the dashboard data files using the raw PH WINS data from all years, including dummy data for PH WINS 2024. See **Data Analysis and Processing** section below for more information.
 - c. Part III: Incorporate PH WINS 2024 Data (completed by July 2025) – once the PH WINS 2024 data has been cleaned, process and input the new data.
4. Quality Control and Launch – this portion of the scope will describe the quality control processes and timeline. Note that the planned launch of the PH WINS 2024 dashboards is for July 2025.
5. Dashboard Maintenance – this portion of the scope of work will be used for ad-hoc maintenance, management, and other support after the dashboards have launched. As stated previously, bidders should plan to maintain the server, handle hosting and maintenance of the dashboard website, authentication system, and back-end management system.

Data Analysis and Processing

As mentioned previously, to reduce load time for users, all data for the current dashboards was pre-processed. No raw data was loaded into the backend of the dashboard. In the past, a contract was executed with a separate data analysis and processing firm and VRCF served as the liaison between them and the data visualization firm. This proved difficult as the data specifications were specific and hard to translate. VRCF seeks a contractor who can provide data analysis and processing services using the raw PH WINS data.

For this scope of work, the contractor should describe in detail their ability to and experience with processing large, raw data sets into the appropriate format for data visualization dashboards. Each file for the national dashboard included 17,316 records (333 variables/responses and 52 filter options) and each file for the agency specific dashboards included 13,860 records (330 variables/records and 42 filter options). If the contractor does not have in-house data analysis and processing capacity, it is required that the contractor contract directly with a separate party to support data analysis and processing. The contractor should specify in the scope of work their prior experience with external contractors. The contractor should also provide specific examples of previous data processing work, whether done in-house or by a subcontractor.

PH WINS 2027 Dashboard Build

Please describe the steps needed to prepare for the addition of PH WINS 2027 data. The goal would be to launch the dashboards in Summer 2028. The steps from above can be repeated. The hope is that the dashboards remain mainly the same between 2024 and 2027 and, thus, a different set of steps may take place.

DELIVERABLES

- Report of recommended enhancements and identified requirements, including suppression rules
- Detailed documentation of quality control process
- National-level website and dashboards
- Agency-specific website and dashboards
- Backend user and password manager, including training on this management system

TIMELINE & BUDGET

The timeline for this project is 5 years, beginning February 1, 2024 and ending December 31, 2028. This project is being funded through the CDC Public Health Infrastructure Grant, which ends in 2027. There is a possibility for a no-cost extension through 2028. Below are some key dates that will describe the PH WINS cycle and expectations for the dashboards.

Key Dates

PH WINS 2024

June 2024: Report of recommended enhancements and identified requirements due

September 2024: Launch of PH WINS 2024

December 2024/January 2025: PH WINS 2024 closes

January 2025: Completion of dummy dashboards, data files, and detailed documentation of quality control process due

February 2025: PH WINS 2024 data cleaned and ready for processing

July 2025: PH WINS 2024 data dashboards launch

PH WINS 2027*

September 2027: Launch of PH WINS 2027

*Additional timelines will be created in collaboration with the chosen contractor based on the experience from the PH WINS 2024 dashboards.

Budget

The total budget for this work is not to exceed \$490,000, of which \$30,000 must be set aside for maintenance. This budget should be task-based and cover both the PH WINS 2024 and 2027 dashboards. Please provide a budget breakdown in the final proposal.

RFP PROCESS TIMELINE

The following is a tentative schedule that will apply to this RFP but may change in accordance with the organization's needs or unforeseen circumstances. Changes will be communicated by e-mail and through SOW negotiations.

Issuance of RFP	November 6, 2023
Scoping Calls	November 6-20, 2023
Confirm Intent to Bid	November 20, 2023
Technical Questions/Inquiries Due	December 4, 2023
Response to Technical Questions/ Inquiries	December 11, 2023
Proposal Due	December 22, 2023
Possible Phone Interview of Finalist Candidates	Week of January 8, 2024
Final Award Notification	Week of January 15, 2024
Expected Start Date	February 1, 2024

PROPOSAL NARRATIVE

Please include the following in the proposal narrative:

- Executive summary
- Statement of the project's purpose
- Initial recommendations for dashboard enhancements*
- Description of the proposed scope of work
- Project staffing and management, focusing on key team members:
 - What are the qualifications of key members? Explain how their experience relates to the substantive and/or methodological issues in this RFP.
 - What role will each key person play on the project?
 - How much time (in days) will each key person spend on the project?
 - Please include the information requested above under **Data Analysis and Processing** about a separate data processing contractor should those services not be available in-house.
- Experience working on complex projects with diverse stakeholders that evolved over time. What challenges did you face and how did you mitigate them?
- Description of how the team will ensure coordination, quality control, and timely delivery of high-quality services and products
- Project timeline and budget

*Please review the current dashboards and provide no more than five recommendations to enhance the dashboards at the outset.

The proposal narrative should not exceed 15 pages, single-spaced, not including attachments.

Required Attachments

In addition to the proposal narrative, please provide:

- Attachment 1: Project budget formatted in accordance with the attached Exhibit 1
- Attachment 2: Curriculum vitae or bios of key team members, and days allocated to this project
- Attachment 3: Two professional references and contact information
- Attachment 4: No more than two examples of work relevant to this project

SELECTION CRITERIA AND PROCESS

Proposals will be judged based on the following criteria:

A. Vendor Experience and Qualifications

Experience and qualifications of the proposed team and its capacity to do the work on time, including:

- Information on the days of staff time allocated to the project and to key tasks
- Evidence of past success working on similar projects
- Prior work products that demonstrate clear and accessible communication of ideas of issues relevant to this project

B. Proposal Content

- Ingenuity of initial recommendations, not to exceed five recommendations
- Quality of staffing proposal
- Coherence and feasibility of the plan for executing the tasks
- Demonstrated understanding of the context within which the project will be conducted, including key challenges the team is likely to face and opportunities it may be able to achieve (including examples of teams' ability to adapt and be flexible)
- Methodology for project implementation and execution
- Project Timeline – proposed methods for implementation, tracking, and reporting progress

C. Cost and Budget Development

- Cost competitiveness and value for the money
- Transparency and accuracy of budget breakdown
- Demonstrated ability to work within proposed budget

D. Quality Assurance

- Quality Assurance processes and measures to ensure accuracy and integrity of data
- Identification and mitigation strategies of potential risks
- Demonstrated understanding of project risks and development proactive solutions

SUBMISSION

Submit questions and your intent to bid no later than 5PM ET on Monday, November 20, 2023. Email your proposals to Moriah Robins at robins@debeaumont.org no later than December 22, 2023.

We look forward to receiving your proposal. Please reach out to Moriah Robins if you have any questions.

Cancellation

We may cancel this request at any time we deem doing so is in the best interest of the Vose River Charitable Trust.

EXHIBIT 1

**THE VOSE RIVER CHARTIABLE FUND
PROPOSAL BUDGET**

The Vose River Charitable Fund requires detailed budget information about applicants' proposals. Expected start date is February 1, 2024.

Project Budget by Major Tasks

Please list the costs for each major task. Staff time should be included in the total cost of the task and not as a separate line item. You may add other categories as needed. For each category in this section, a budget narrative should indicate how the cost was determined.

This project is being funded using federal funds. Under the auspice of a federal grant such as PHIG, you must use your federally negotiated indirect rate. If you don't have one, the federal government allows you to use a 10% de minimis rate.

The total cost of this project should not exceed \$490,000. Please remember to allocate funds in your budget for maintenance costs, which should total \$30,000. The suggested breakdown for maintenance costs is as follows: 2024: \$0; 2025: \$5,000; 2026: \$10,000; 2027: \$10,000; 2028: \$5,000.

<u>Major Task</u>	<u>Amount</u>
	\$
	\$
	\$
	\$
	\$
	\$
	\$

Total Requested: \$