**RFP 24-75386**

**ATTACHMENT E: BUSINESS PROPOSAL**

**Instructions: Please provide answers in the shaded areas to all questions. Reference all attachments in the shaded area.**

***Business Proposal***

* + 1. **General (optional) -** Please introduce or summarize any information the Respondent deems relevant or important to the State’s successful acquisition of the products and/or services requested in this RFP.

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| Ensuring healthy pregnancies and healthy babies across the State of Indiana requires innovation, both in care delivery and in data systems to support it. The envisioned future state for Indiana’s MCH delivery of timely, transparent, and collaborative care for maternal and child health (MCH) services necessitates a robust and integrated data system.  Success of the MCH Data System project relies on the selection of a collaborative, effective technology partner for the Indiana Department of Health (IDOH). Dimagi brings over two decades of experience delivering human-centered technology for more than 3,000 critical health and social programs worldwide. Our experienced team works closely with government agencies and community stakeholders to design tailored solutions, offering MCH not just a technology vendor but a true thought partner in solution design and implementation. Our deep commitment to public health is evidenced by our role in key public health crises, including our pivotal contributions during the COVID-19 pandemic, where we developed contact tracing solutions upon request from the CDC.  In addition to selecting the right technology partner, IDOH benefits from an approach, solution, and project team committed to both near and long-term impact anchored in the Indiana context. Dimagi's approach to technology deployment is deeply rooted in our mission to solve public health challenges through scalable, flexible data and system infrastructure and user-centered design. Our low-code application platform (LCAP), CommCare, empowers IDOH with an app builder interface that enables sustainable, rapid maintenance and enhancement. Dedicated capacity building unlocks IDOH’s potential to manage changes independently. We emphasize a collaborative, agile approach that incorporates continuous feedback from users and stakeholders on real-world workflows that make an immediate impact. Dimagi's history of supporting partners in multi-year creation of novel data systems, such as with the Colorado Behavioral Health Administration, demonstrates our capacity to deliver effective, long-term solutions and diverse services. Our commitment to supporting IDOH extends beyond the initial deployment. Dimagi offers dedication to the MCH mission and to continuously shaping and improving technology that achieves these goals.  Our proposal recognizes the importance of the local context and realities surrounding the MCH Data System. Dimagi’s team commits to building relationships with stakeholders and joining key on-site project phases. Our Senior Advisors bring substantial past experience with the State of Indiana and their technology projects. Our Indiana-based subcontractors, CSpring and Metamor Systems, enable us to address data migration, integration, and interface requirements efficiently with a local presence. This ensures a deep understanding of the regional landscape, further enhancing our ability to meet IDOH's needs.  With our expertise and unwavering commitment to public health, Dimagi stands ready to support Indiana in achieving its goals for maternal and child health, ensuring long-term success and impact. |

* + 1. **Respondent’s Company Structure** - Please include in this section the legal form of the Respondent’s business organization, the state in which formed (accompanied by a certificate of authority), the types of business ventures in which the organization is involved, and a chart of the organization. If the organization includes more than one (1) product division, the division responsible for the development and marketing of the requested products and/or services in the United States must be described in more detail than other components of the organization. Please enter your response below and indicate if any attachments are included.

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| Dimagi is incorporated in the State of Massachusetts as a Benefit Corporation. Attached to this proposal package is the Certificate of Incorporation:   * Att\_E\_-\_Certificate\_of\_Incorporation   Dimagi’s operations encompass the following sectors as classified by the North American Industry Classification System (NAICS):   * 513210: Software Publishers * 518201: Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services. * 513210: Software Publishers * 518210: Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services. * 541511: Custom Computer Programming Services. * 541512: Computer Systems Design Services * 541513: Computer Facilities Management Services * 541519: Other Computer-Related Services * 541990: All Other Professional   Dimagi’s US Health Division (USH) is responsible for the provision of technology and professional services to clients in the US. We envision a world in which all people receive the services they need to thrive. USH seeks to create innovative and sustainable technology solutions that improve the health and equity of individuals and communities in the US. To achieve this objective we work to achieve the following value propositions:   * **Improve Health Outcomes:** Create digital tools that have the potential to radically improve the experience and outcomes in health. * **Promote Equity:** Design digital systems that promote equity and reach the most underserved populations * **Think Long-term:** Build robust & durable systems that are meant to last and be adaptable over time * **Ensure Access:** Provide accessible & affordable solutions to meet the needs of communities (we are employee-owned and motivated by impact, team, and profit - in that order) * **Advance the Field:** We blend a competitive spirit with a collaborative approach to create thought leadership that benefits the ecosystem in the long run.     The SaaS Division is responsible for the creation, maintenance, and deployment of the CommCare platform. The US Health Division handles the configuration of web applications on CommCare and provides client-specific enhancements, including monitoring and reporting for Maintenance and Operations (M&O). As outlined in our proposal materials, all project staff and CommCare hosting will be based in the United States. |

* + 1. **Respondent’s Diversity, Equity, and Inclusion Information -** With the Cabinet appointment of a Chief Equity, Inclusion and Opportunity Officer, on February 1, 2021, the State of Indiana sought to highlight the importance of this issue to the state. Please share leadership plans or efforts to measure and prioritize diversity, equity, and inclusion. Also, what is the demographic compositions of Respondents’ Executive Staff and Board Members, if applicable.

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| **Leadership Efforts to Measure and Prioritize Diversity, Equity, and Inclusion**  Dimagi is committed to continually evolving and improving our culture in being a diverse and inclusive workplace that advances equity within our team and operations. By investing in diversity, equity, and inclusion and creating a clear strategy to improve in these areas, we will better support our most valuable resource - our team - as well as advance our mission. Dimagi’s leadership has codified the following Affirmative Action Program (AAP), affirming our commitment to measure and prioritize diversity, equity, and inclusion:  **Introduction**  Dimagi has prepared this Affirmative Action Program (AAP) for the period of July 1, 2022, through June 30, 2023, reaffirming its commitment to the letter and spirit of affirmative action law, including those administered by the U. S. Department of Labor’s Office of Federal Contract Compliance Programs (OFCCP). Through the implementation of this AAP, Dimagi continues its efforts to comply with appropriate government regulations and to make the best possible use of personnel while contributing to the betterment of society and the community.  In developing this AAP Dimagi recognizes its duty to ensure equal employment  opportunity. The following statement of policy reinforces that belief.  **Reaffirming Commitment to Equal Employment Opportunity**  In setting forth this AAP Dimagi reaffirms its belief in equal employment opportunity for all employees and applicants for employment in all terms and conditions of employment.  Molly Flynn, Global Director of People Operations of Dimagi, designated Michael Smith as the Equal Employment Opportunity Administrator (EEO Administrator). Michael Smith oversees the AAP development, modification, implementation, and reporting requirements and conducts management updates. The EEO Administrator also analyzes Dimagi's selection process to further the principles of equal employment opportunity. As part of Dimagi's commitment to this overall process, it will seek to ensure affirmative action to provide equality of opportunity in all aspects of employment, and that all personnel activities, such as the recruitment, selection, training, compensation, benefits, discipline, promotion, transfer, layoff, and termination processes remain free of illegal discrimination and harassment based upon race, color, religion, sex, sexual orientation, gender identity, and national origin. Regular review by Dimagi, as described in this AAP, helps ensure compliance with this policy.  **Demographic Compositions of Respondents’ Executive Staff and Board Members**  **Management Team:**  Gender   * 22.2% female * 66.7% male   Race/Ethnicity   * 11.1% Black or African American * 11.1% Prefer not to say * 11.1% Two or more races * 22.2% Asian * 44.4% White   **Board of Directors**  Gender   * 100% male   Race/Ethnicity   * 33.3% Asian * 33.3% Two or more races * 33.3% White |

* + 1. **Company Financial Information** - This section must include documents to demonstrate the Respondent’s financial stability. Examples of acceptable documents include most recent Dunn & Bradstreet Business Report (preferred) or audited financial statements for the two (2) most recently completed fiscal years. If neither of these can be provided, explain why, and include an income statement and balance sheet, for each of the two most recently completed fiscal years.

If the documents being provided by the Respondent are those of a parent or holding company, additional information should be provided for the entity/organization directly responding to this RFP. That additional information **should explain the business relationship between the entities and demonstrate the financial stability of the entity/organization which is directly responding to this RFP.**

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| Understanding the need for a vendor that has strong financial standing, Dimagi has included as an attachment to this proposal package the signed and audited financial statements for the two most recently completed fiscal years, 2022 and 2023:   * Att\_E\_-\_ Audited\_Financial\_Statements\_2022 * Att\_E\_- \_Audited\_Financial\_Statements\_2023 |

* + 1. **Integrity of Company Structure and Financial Reporting** - This section must include a statement indicating that the CEO and/or CFO, of the responding entity/organization, has taken personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. The areas of interest to the State in considering corporate responsibility include the following items: separation of audit functions from corporate boards and board members, if any, the manner in which the organization assures board integrity, and the separation of audit functions and consulting services. The State will consider the information offered in this section to determine the responsibility of the Respondent under IC 5-22-16-1(d).

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| Dimagi CEO Jonathan Jackson takes personal responsibility for the thoroughness and correctness of all financial information supplied with this proposal. Included as an attachment to this proposal package is a signed statement affirming the responsibility of Dimagi, Inc. under IC 5-22-16-1(d):   * Att\_E\_-\_Statement\_of\_Personal\_Responsibility\_for\_Financial\_Information |

* + 1. **Contract Terms/Clauses** - Please provide the requested information in RFP Section 2.3.6.

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| Dimagi has reviewed the sample contract Attachment B and accepts all terms as written. |

* + 1. **References** - Reference information is captured on **Attachment H** Respondent should complete the reference information portion of the **Attachment H** which includes the name, address, and telephone number of the client facility and the name, title, and phone/fax numbers of a person who may be contacted for further information if the State elects to do so. The rest of **Attachment H** should be completed by the reference and **emailed DIRECTLY** to the State. The State should receive three (3) **Attachment Hs** from clients for whom the Respondent has provided products and/or services that are the same or similar to those products and/or services requested in this RFP. **Attachment H** should be submitted to [idoareferences@idoa.in.gov](mailto:idoareferences@idoa.in.gov). **Attachment H** should be submitted no more than ten (10) business days after the proposal submission due date listed in Section 1.24 of the RFP. Please provide the customer information for each reference.

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| **Customer 1** |  |
| Legal Name of Company or Governmental Entity | Colorado Behavioral Health Administration |
| Company Mailing Address | 710 S. Ash St., C140 |
| Company City, State, Zip | Denver, CO 80246 |
| Company Website Address | <https://bha.colorado.gov/> |
| Contact Person | Janell Schafer Cody |
| Contact Title | BHA Tech & Data Division Deputy Supervisor |
| Company Telephone Number | 720-765-6133 |
| Company Fax Number | n/a |
| Contact E-mail | [janell.schafercody@state.co.us](mailto:janell.schafercody@state.co.us) |
| Industry of Company | Government |
| **Customer 2** |  |
| Legal Name of Company or Governmental Entity | Vermont Agency of Human Services, Housing Policy and Planning Department |
| Company Mailing Address | 280 State Drive |
| Company City, State, Zip | Waterbury, VT 05671-1080 |
| Company Website Address | <https://humanservices.vermont.gov/> |
| Contact Person | Kristin McClure |
| Contact Title | Chief Data Officer |
| Company Telephone Number | 802-798-2668 |
| Company Fax Number | 802-241-0450 |
| Contact E-mail | [Kristin.McClure@vermont.gov](mailto:Kristin.McClure@vermont.gov) |
| Industry of Company | Government |
| **Customer 3** |  |
| Legal Name of Company or Governmental Entity | New Jersey Department of Health |
| Company Mailing Address | Department of Health, P.O. Box 360 |
| Company City, State, Zip | Trenton, NJ 08625-0360 |
| Company Website Address | <https://www.nj.gov/health/> |
| Contact Person | Greta Anschuetz |
| Contact Title | Assistant Commissioner, Division of HIV, STD and TB Services |
| Company Telephone Number | 609-954-8586 |
| Company Fax Number | n/a |
| Contact E-mail | [Greta.Anschuetz@doh.nj.gov](mailto:Greta.Anschuetz@doh.nj.gov) |
| Industry of Company | Government |

* + 1. **Registration to do Business** – Per RFP 2.3.8,Respondents providing the products and/or services required by this RFP must be registered to do business by the Indiana Secretary of State. The Secretary of State contact information may be found in Section 1.18 of the RFP. This process must be concluded prior to contract negotiations with the State. It is the successful Respondent’s responsibility to complete the required registration with the Secretary of State. Please indicate the status of registration, if applicable. Please clearly state if you are registered and if not provide an explanation.

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| Dimagi, Inc. is registered to do business in the State of Indiana effective May 23, 2024.  **Business ID:** 202405231794279  Attached to this proposal response are the approved registration statement and filings from the State of Indiana Office of the Secretary of State. |

* + 1. **Authorizing Document -** Respondent personnel signing the Executive Summary of the proposal must be legally authorized by the organization to commit the organization contractually. This section shall contain proof of such authority. A copy of corporate bylaws or a corporate resolution adopted by the board of directors indicating this authority will fulfill this requirement. Please enter your response below and indicate if any attachments are included.

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| Dimagi has included our articles of incorporation as an attachment which show that Lucina Tse is a signatory and legally authorized to commit the organization contractually:   * Att\_E\_-\_Articles\_of\_Incorporation |

* + 1. **Diversity Subcontractor Agreements**

1. Per RFP Section 1.21, Minority & Women’s Business Enterprises (MBE/WBE), explain process followed to engage with potential MBE or WBE owned, Indiana certified businesses listed on Division of Supplier Diversity site.  List the businesses invited to discuss the opportunity for potential partnership.
2. If not proposing each MBE or WBE subcontractor partnership, explain the rationale for declining to do so.  Complete this for each category not proposed.

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| a. In addition to the two subcontractor partnerships included in this proposal, Dimagi engaged with several potential MBE or WBE owned, Indiana certified businesses. Dimagi connected with these additional businesses during the pre-proposal phase of this opportunity, submitting to and utilizing the published networking form facilitated by Indiana’s procurement team. Dimagi established non-disclosure agreements and exchanged detailed information with select subcontractors through both written and verbal communication to evaluate if our mutual aims and offerings could meet the needs of this proposal. Ultimately Dimagi selected two subcontractor partnerships to include in this proposal, CSpring and Metamor Systems. Together our three businesses offer a collaborative team that meets both the needs of the opportunity and the aims of engaging MBE/WBE.    b. Dimagi is proposing subcontractor partnership with both a MBE and WBE owned business. Please find attached to this proposal package the M/WBE Certification Forms for CSpring and Metamor Systems:   * Subcontractor WBE Certification\_CSpring * Subcontractor MBE Certification\_Metamor |

* + 1. **Evidence of Financial Responsibility** – Removed at the request of the agency.

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* + 1. **General Information** - Each Respondent must enter your company’s general information including contact information.

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| **Business Information** |  |
| Legal Name of Company | Dimagi, Inc. |
| Contact Name | Molly Maher |
| Contact Title | Deputy Director of Partnerships |
| Contact E-mail Address | mmaher@dimagi.com |
| Company Mailing Address | 585 Massachusetts Ave, Suite 3. |
| Company City, State, Zip | Cambridge, MA 02139-4075, USA, County: Middlesex |
| Company Telephone Number | (617) 649-2214 |
| Company Fax Number | (617) 274-8393 |
| Company Website Address | <https://www.dimagi.com/> |
| Federal Tax Identification Number (FTIN) | 83-0343298 |
| Number of Employees (company) | 262 |
| Years of Experience | 22 |
| Number of U.S. Offices | 1 |
| Year Indiana Office Established (if applicable) | N/A |
| Parent Company (if applicable) | N/A |
| Revenues ($MM, previous year) | 24,327,294 |
| Revenues ($MM, 2 years prior) | 27,433,808 |
| % Of Revenue from Indiana customers | 0% |

* 1. Does your Company have a formal disaster recovery plan? Please provide a yes/no response. If no, please provide an explanation of any alternative solution your company has to offer. If yes, please note and include as an attachment.

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| Yes, Dimagi's Site Reliability Engineering and Corporate Operations teams uphold a rigorously tested Business Continuity Plan and Disaster Recovery Plan, outlining our comprehensive approach to backups and disaster recovery. The Business Continuity and Disaster Recovery Plan is included as an attachment to this proposal package. |

* 1. What is your company’s technology and process for securing any State information that is maintained within your company?

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| Dimagi prioritizes security in all aspects of development and deployment, ensuring the highest standards are consistently met. Our security policies and practices are rigorously aligned with NIST 800-53 guidelines, and we complete a comprehensive SOC 2 Type 2 audit annually to validate the effectiveness of our security and privacy controls. Our SOC 2 Type 2 reports are available to our partners, providing evidence of our ability to secure State data, including sensitive health information. In addition, we conduct penetration tests on our systems at least once a year and perform external vulnerability assessments on a quarterly basis. These assessments have not uncovered major findings, but according to our policies, any identified issues would result in immediate remediation.  Our proposed solution will be hosted in a HIPAA-compliant cloud environment within an enterprise-grade ISO 27001 compliant AWS data center located in the United States. This ensures that all State information is maintained with the utmost security. Data within our systems is encrypted both in transit and at rest, adhering to the highest encryption standards to safeguard sensitive information.  The platform we propose, CommCare, is specifically designed to be fully HIPAA compliant, thereby guaranteeing the confidentiality and security of our clients' data. Access to data within CommCare is strictly role-based, ensuring users can only access information pertinent to their roles, which minimizes the risk of unauthorized access. Role-based access requirements will be identified in the requirements and design stage early in the project in collaboration with the State. User roles are highly configurable, allowing for granular permissions for data functionality access and data access, including by association to a particular region (e.g., seeing records for clients who live in a county for which the user is assigned access) or particular facility/program association (e.g., seeing records for clients who are enrolled in a program to which the user is granted access).  Dimagi has extensive experience in meeting federal requirements, demonstrated through our work as a direct contractor for the National Institutes of Health (NIH). We have successfully passed numerous state and local security reviews, solidifying our reputation as a trusted custodian of sensitive data for our partners, including various state departments of health for pandemic response following recommendations by the CDC. Dimagi is committed to adhering to the State’s Information Security Framework and statewide IT policies. Dimagi has reviewed the State’s 17 IT policies and confirmed conformance to all applicable policies, with further detail contained in our Technical Proposal Section 6 and Attachment L Cloud Questionnaire.  In summary, Dimagi's approach to securing State information involves robust encryption, stringent compliance with federal standards, regular security audits and tests, and a proven track record of managing sensitive data securely. This comprehensive strategy ensures that State information will be safeguarded with the highest level of security throughout our engagement. |

* + 1. **Experience Serving State Governments -** Please provide a brief description of your company’s experience in serving state governments and/or quasi-governmental accounts.

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| Dimagi routinely collaborates with government agencies and non-governmental organizations in regional- and country-level health and social service efforts to offer proven, scalable solutions that lead to better health outcomes. In addition to collaboration with community based organizations and universities, we have worked with the following United States government agencies in the last five years:   * Dimagi collaborated with **state and local agencies** in the design, development and maintenance of technical solutions for COVID-19 response, behavioral health care coordination, and social care coordination. Dimagi statewide behavioral health care coordination platform built on the momentum of Colorado partnership sustained during the COVID-19 pandemic, creating a MAT registry, bed tracker, and complementary data platform for providers and clinicians throughout the state.   + COVID-19 Response     - Alaska Department of Public Health Nursing (2020-June 2023)     - Colorado State Department of Public Health and the Environment (2020-June 2023)     - New Jersey State Department of Health (2020-June 2023)     - New York State Department of Health (2020-March 2023)     - City of Philadelphia Department of Health (2020-present)   + Colorado Behavioral Health Administration (2022-present), statewide behavioral health care coordination   + State of Vermont Transitional Housing Program (2022-2024), statewide social care coordination * Dimagi collaborated with **national and tribal agencies** to design, develop, and maintain care coordination platform solutions. Our engagement with the Navajo Nation initially involved creating a cancer education care tool. However, with the onset of the pandemic, our partnership pivoted to focus on developing COVID-19 response solutions.   + Navajo Nation Department of Health and Community Outreach and Patient Empowerment Program ([COPE](https://www.copeprogram.org/)) (2015-2022)   + Tuba City Regional Health Care Corporation (TCRHCC) (2022 - Present)   + Centers for Disease Control (multiple projects, 2007-present)   + National Institutes of Health (NIH) (multiple projects, 2007-present)   + United States Agency for International Development (USAID) (multiple projects, 2010-present)   Our Attachment F Technical Proposal includes detailed information about key government projects that support Dimagi’s qualifications for the MCH Data System project. |

* + 1. **Experience Serving Similar Clients -** Please describe your company’s experience in serving customers of a similar size to the State with similar scope. Please provide specific clients and detailed examples.

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| Dimagi serves as the technical services provider for Colorado’s Behavioral Health Administration (BHA), supporting behavioral health care coordination across the state. This extensive initiative, which began in January 2022, is being rolled out over several years to meet the needs of an increasingly broad and diverse group of stakeholders. The engagement's complexity is evident in its size and scope, encompassing both programmatic and technical aspects. Dimagi is responsible for project management, leading the Design, Development, and Implementation (DDI) and Maintenance and Operations (M&O) phases, as well as testing, training, and state enablement.  On the technical side, Dimagi delivers a suite of care coordination tools, including care management and data platform solutions. These tools feature provider registries, bed registry searching, and referrals software to facilitate priority behavioral health service delivery. Our data platform work involves aggregating data sources and developing a cloud-based data warehouse, supporting dashboards and reports that enable programmatic decision-making at scale. This project emphasizes the high level of collaboration and customization required to meet Colorado’s specific needs while maintaining the benefits of a robust platform software product.  The collaboration has been a resounding success, evidenced by the continued expansion and additional services Colorado has chosen to pursue with us. The platform now supports over 700 clinics throughout the state, with over 2,000 care coordination users. In addition, there are over 350 data platform users. In 2023 alone, the platform supported nearly 9,000 admissions, significantly expediting an intake process that previously took between one to four days to less than a day, with much less hands-on involvement from the state. Additionally, the solution identified more than 2,250 instances of duplicate identifications since going live. Our team works closely with government and clinical stakeholders to design, build, and deliver solutions for behavioral health care coordination.  Dimagi's experience with the BHA engagement underscores our capacity to handle large, complex projects efficiently and effectively. Our work with organizations of comparable size to the State of Indiana, such as the CDC and various State-based COVID-19 response efforts, further highlights our ability to deliver high-impact solutions on a large scale. We emphasize collaboration and customization to meet specific client needs while leveraging the strengths of our robust software products. |

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    2. **Payment -** Removed at the request of the agency.

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* + 1. **Extending Pricing to Other Governmental Bodies** – Removed at the request of the agency.

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* + 1. **Cloud terms** – Additional Terms and Conditions related to Cloud-based systems the State expects to execute with the successful Respondent(s) are provided in Attachments B1, B2, and B3, respectively Infrastructure-as-a-Service (IaaS), Platform-as-a-Service (PaaS) and Software-as-a-Service (SaaS). Depending on your proposed System, you could be required to agree to one or more of the Additional Terms and Conditions. It is the State’s strong desire not to deviate from the Additional Terms and Conditions that are provided in these attachments and as such the State reserves the right to reject all requested changes. Any or all portions of this RFP and any or all portions of your response may be incorporated as part of the final contract.

Please indicate in your response below which of these sets of Additional Terms and Conditions you believe applies to your proposed System. Review these Additional Terms and Conditions and indicate acceptance and / or any redlined edits, via Track Changes.

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| Based on our proposed system, the Additional Terms and Conditions provided in Attachment B3 for Software-as-a-Service (SaaS) apply. Dimagi does not suggest any changes to these Additional Terms and Conditions and accepts them as presented. |