

**STATE OF INDIANA**

**Request for Information 25-83755**

**Indiana Department of Administration**

**On Behalf of the**

**Indiana Department of Health**

**Solicitation For:**

**Health First Indiana (HFI) Budget and Operational activities Solution**

**Response Due Date:**

**May 23rd, 2025 by 3 PM ET**

Kevin March, Procurement Consultant

Indiana Department of Administration

Procurement Division

402 W. Washington St., Room W468

Indianapolis, Indiana 46204

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**REQUEST FOR INFORMATION 25-83755**

# INTRODUCTION

This is a Request for Information (RFI) issued by the Indiana Department of Administration (IDOA) on behalf of the Indiana Department of Health (IDOH) regarding the Health First Indiana’s (HFI) Local Health Departments (LHDs) budget and activity reporting solution.

It is the intent of IDOA to solicit responses to this Request for Information in accordance with the specifications contained in this document and associated attachments. Neither this RFI nor any response (proposal) submitted hereto is to be construed as a legal offer.

**The State may elect to limit participation in any future competitive solicitation to vendors that respond to this RFI.**

# BACKGROUND AND OBJECTIVE of the RFI

The primary objectives of this RFI are to gather information from vendors for the development of a potential Request for Proposal (RFP) for Health First Indiana (HFI) LHDs budget and activity reporting solution. The goal is to identify vendors capable of delivering an efficient, scalable, and secure solution that aligns with the strategic goals of IDOH, its partners, and Local Health Departments (LHDs). Responses will be used to evaluate vendors' expertise, solution capabilities, implementation methodologies, and cost structures. This solution is crucial to:

* **Ensure compliance** with the Senate Enrolled Act 4-2023, which mandates LHDs to report metrics related to core public health services which includes both budget and operational activities in June and December.
* **Facilitate enhanced collaboration** among LHDs to collectively enhance core public health services.
* **Support various user-roles and functions**, drive user adoption, and enhance productivity for IDOH, its partners, and LHDs.
* **Assist IDOH** and its partners in strategizing effective support for LHDs.

While existing tools, including PowerApps applications, were created for this process, they lack flexibility, usability, and integration capabilities, making reporting difficult and inefficient. This has led to data inconsistencies and challenges in decision-making at both the IDOH and LHDs level. By investing in an alternative, user-friendly, and scalable HFI solution, IDOH anticipates the new solution will cover the following key areas:

* **Access Integration with Access Indiana:** Ensure seamless data access.
* **Activity Reporting:** Enable efficient reporting of LHDs activities.
* **Budget Reporting:** Streamline budget-related information reporting for LHDs.
* **Core Service Progress Measures:** Enable dynamic KPI reporting at IDOH and LHD levels.
* **Reporting and Dashboard Needs:** Facilitate real-time reporting and dashboards to support IDOH and LHDs data-driven decision-making.

**Guidance**

To define the most effective solution, IDOH engaged LHD stakeholders through interviews and wire frame demonstrations to identify the specific functionalities needed. These discussions provided valuable functional and technical insights into the proposed solution, which is aimed at enhancing budget management, streamlining activity tracking, and improving reporting capabilities. Please refer to the detailed **HFI requirements document** (Attachment C) included as part of the complete RFI package for comprehensive information on the solution’s needs and expectations. The key insights are outlined below:

**Functional Insights:**

* **Budget and Financial Management:**
  + Dynamic Budget Summary for current fiscal year budget tracking.
  + Streamline workflows for budget submission, approval, and tracking.
  + Forecast future financial needs and allocate resources effectively.
  + Ability to automatically manage multiple budget documents and the capability to create relationships between them.
* **Activity Tracking and Task Management:**
  + Provide a centralized activity navigation menu to include creating new activities, managing templates and documents.
  + Centralize task tracker for dynamic task assignment and progress monitoring.
  + Enable real-time tracking of activities linked to Core Services provided.
  + Implement a role-based access control for creating, modifying and action driven activities.
  + Enable a dynamic data tracker integrated with Core Services, that will automatically adjust questions based on the selected core services.
* **Dynamic Reporting and Analytics:**
  + Provide comprehensive and customizable reporting insights into budget, activities and Key Performance Indicators (KPIs).
  + Present configurable dashboards with drill-down capabilities for in-depth insights.
  + Enable KPI tracking and performance trend analytics to measure impact and progress.
  + Allow real-time KPI tracking and Core Service Distribution monitoring.
  + Deliver accessible reports in multiple formats (PDF, Excel, web-based interactive dashboards, etc.).
* **Additional insights:**
  + Develop announcements, comments and most recent documents sections.
  + Display HFI Branding, search bar, alerts or notifications, profile and FAQs on a navigation menu.

**Technical Insights:**

* **Role-based access controls (RBAC)**
  + Implement RBAC to control and manage access to specific views of budget plans, activities and KPIs.
  + Support alignment of users to multiple roles, granting them access based on assigned roles.
  + Ensure user authentication and permission validation according to business needs.
* **Log Management**
  + Ensure comprehensive log collection of all field changes, including user unique ID, timestamps and initial values.
  + Implement centralize log storage with clear retention policies for compliance efforts.
  + Implement a log security with encryption and access controls.
  + Design for scalability to handle increasing log volumes.
* **Versioning**
  + Maintain version history to track changes over time.
  + Build in auto-save changes every minute to minimize data loss and duplicates.
  + Ensure background saves automatically without disrupting workflow.
  + Enable conflict resolution for simultaneous edits.
* **Administrator Configuration**
  + Allow IDOH Admins to modify dropdown lists and master tables for core services.
  + Ensure all IDOH Admin modifications are reflected real-time throughout the entire HFI solution.
* **Security and Compliance**
  + Ensure compliance with all applicable regulatory mandates.

IDOH is requesting information to formalize the scope of work for a potential RFP by allowing the vendor community to apprise IDOH on information that should be considered as part of the scope of work.

# RESPONSE FORMAT AND ATTACHMENTS

Respondents should submit responses to the RFI, utilizing **Attachment A**, describing how they will meet the specific requirements of this RFI, and the deliverables included within. All narrative responses must be provided to the State in Microsoft Word format. Respondents must structure their response according to the sections outlined below to facilitate the State’s review of the responses. **the total response should not be more than 15-20 pages in length**.

If you would like to provide a response or feedback to this RFI for a potential RFP to IDOH, you must provide your response to the State as shown in the RFI Timeline and Response Submission section below.

# RFI TIMELINE

The following timeline is only an illustration of this RFI process. The dates associated with each step are not to be considered binding.

***Anticipated RFI Dates:***

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Issuance of RFI | April 16, 2025 |
| Deadline to Submit Written Questions (3:00PM Eastern Time) | April 25, 2025 |
| Response to Written Questions/RFI Amendments | May 2, 2025 |
| Due Date for Submissions (3:00PM Eastern time) | May 23, 2025 |

# QUESTION / INQUIRY PROCESS

All questions/inquiries in regard to RFI 25-83755 must be submitted in writing via email using **Attachment B**, Questions and Answers Template, by the deadline of **April 25, 2025 by 3:00PM ET** to [rfp@idoa.IN.gov](mailto:rfp@idoa.IN.gov). The email subject line should contain the following phrase:

**“REQUEST FOR INFORMATION 25-83755, QUESTION AND INQUIRIES.”**

Following the question/inquiry due date, IDOA will compile a list of the questions/inquiries submitted by all Respondents. The responses will be posted to the IDOA website as soon as possible. Only answers posted on the IDOA website will be considered official and valid by the State. No Respondent shall rely upon, take any action, or make any decision based upon any verbal communication with any State employee.

Please note that Kevin March is the State’s single point of contact for this RFI. **Inquiries are not to be directed to any other staff member of the IDOH.** Such action may disqualify respondents from further consideration in this RFI and any subsequent RFP process.

If it becomes necessary to revise any part of this RFI, or if additional information is necessary for a clearer interpretation of provisions of this RFI prior to the due date for submissions, an addendum will be posted on the IDOA website.

# CLARIFICATIONS AND DISCUSSIONS

The State reserves the right to request clarifications on information submitted to the State. The State also reserves the right to conduct discussions, either oral or written, with the Respondents. These discussions could include requests for additional information, requests for cost information or technical requirements response attachment revision, etc. Additionally, in conducting discussions, the State may use information derived from the responses submitted by competing Respondents only if the identity of the Respondent providing the information is not disclosed to others. The State will provide equivalent information to all Respondents which have been chosen for discussions.

The Procurement Division will schedule all discussions. Any information gathered through oral discussions must be confirmed in writing.

# CONFIDENTIALITY

It is important to note that all information submitted in Respondent’s proposals to this RFI will be kept confidential and will not be made available to the public unless this RFI does not result in the release of a solicitation at a later date. If a solicitation results from this RFI, then the information contained in the proposal submissions for this RFI must be made available to the public once the resulting solicitation has been awarded and the protest period has ended.

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (APRA), IC 5-14-3 et seq., and, after being awarded, the entire solicitation file may be viewed and copied by any member of the public, including news agencies and competitors.

Please note citing “Confidential” on an entire section is not sufficient. The Public Access Counselor (PAC) provides guidance on APRA. Respondents are encouraged to read guidance from the PAC on this topic as this is the guidance IDOA follows:

* [18-INF-06; Redaction of Public Procurement Documents Informal Inquiry](https://protect.checkpoint.com/v2/___https://www.in.gov/pac/informal/files/18-INF-06.pdf___.YzJ1OnN0YXRlb2ZpbmRpYW5hOmM6bzo0ODY3MGQ4MjI3YWYwM2VlNDI1OTMwZTBlNjZkZTNiMDo2OmZhMDc6NWFhZDFiYzU2YjZlM2I5ZjI5OGUyNGRmZjYxZjUyNWFlZTM2MjEzYWMwOTMyMGVkMjRmNDkxMjkxMjI5MzliYzpwOlQ6Tg)

Respondents claiming a statutory exception to the APRA must indicate so on a separate attachment labeled “**Confidential Documentation Listing**”. That document should include the following information:

* List all documents claiming a statutory exemption to the APRA.
* Specify which statutory exception of APRA that applies for each document.
* Provide a description explaining the manner in which the statutory exception to the APRA applies for each document.

**When claiming confidential information, respondents should submit two versions of their response:**

1. A confidential version (for the State’s review and evaluation)
   1. Confidential Information must be clearly marked in a separate folder.
2. A redacted version (for public records requests).

If the Respondent does not identify the statutory exception, the Procurement Division will not consider the submission confidential. The State also reserves the right to seek the opinion of the PAC for guidance if the State has doubts that the cited exception is applicable.

Prices are **NOT** confidential information.

# RESPONSE SUBMISSION INSTRUCTIONS

Firms interested in providing information to IDOA should submit responses via email to [rfp@idoa.IN.gov](mailto:rfp@idoa.IN.gov). All responses must be received no later than **May 23, 2025 by 3:00PM ET.** The subject line of the email submission must clearly state the following:

**“RESPONSE TO REQUEST FOR INFORMATION 25-83755”**

Any information received after the due date and time may not be considered.

No more than one proposal per Respondent may be submitted.

Templates outlined in this document should be returned in their native file format.

The State accepts no obligations for costs incurred by Respondents in anticipation of being awarded a contract.