

West Virginia First Foundation, Inc.
Request for Proposals
for Needs Based Assessment

March 14, 2025

Re: Request for Proposals for Needs Based Assessment

I. BACKGROUND

West Virginia First Foundation, Inc. (“Foundation”) was created according to the terms, provisions, and principles stated in the *West Virginia First Memorandum of Understanding* ("MOU") entered into by and among the State of West Virginia, counties, cities, villages, and towns located within the geographic boundaries of the State of West Virginia. The MOU directed that the State and the Local Governments create an independent private foundation for the purposes of receiving and disbursing opioid settlement funds and for the purposes in the MOU and the Foundation's governing documents.

The Foundation is organized and exists as a nonprofit, nonmember corporation under W. Va. Code 31E-1-101 *et seq.* and is to be operated exclusively for charitable, educational, and scientific purposes within the meaning of § 501(c)(3) of the Internal Revenue Code of 1986, as amended, to hold, invest, manage, and distribute the proceeds of Judgments and other funds for the support of evidenced-based strategies, programming or services used to expand the availability of treatment for individuals affected by substance use disorder (SUD) or addiction; develop, promote, and provide evidence-based substance use prevention strategies; provide substance use avoidance and awareness education; engage in enforcement to curtail the sale, distribution, promotion, or use of opioids and other drugs; decrease the oversupply of licit and illicit opioids; and support recovery from addiction to be performed by qualified providers as described in the MOU.

The Articles of Incorporation describe the Foundation's purposes as follows:

A. To promote the health and safety of West Virginians by implementing evidence-based strategies, programming, and/or services used to (i) expand the availability of treatment for individuals affected by substance use disorders and/or addiction; (ii) develop, promote, and provide evidence-based substance use prevention strategies; (iii) provide substance use avoidance and awareness education; (iv) engage in enforcement to curtail the sale, distribution, promotion or use of opioids and other drugs; and (v) decrease the oversupply of licit and illicit opioids and to (vi) support recovery from addiction to be performed by qualified providers;

B. To advocate for the interests of West Virginians by working with the State of West Virginia, and its counties, cities, villages *etc.*, to determine the best way to provide West Virginians with the programs and services described in Section A;

C. To promote the design, implementation, operation, and maintenance of a fully interoperable statewide network to facilitate the best use of abatement funds and information in West Virginia;

D. To fund the programs and services described in Section A above by disbursing through a competitive grant process funds to private organizations and government agencies engaged in such programs;

E. The Corporation shall not engage in activities which do not further the exempt purposes of the corporation, except for those nonexempt activities which are an insubstantial part of its activities as determined by the Internal Revenue Service;

F. To perform any lawful act for which corporations may be created and transact business in the state of West Virginia, consistent with not-for-profit status; and

G. To do any and all lawful acts and engage in any and all activities consistent with or in furtherance of its general purpose.

II. DESCRIPTION OF SERVICES REQUESTED

The Foundation is soliciting proposals from interested persons or firms for the performance of a statewide needs-based assessment (“Needs Assessment”). Broad focus of this Needs Assessment will include integration of modern, data-driven methodologies and expansion of access to all providers and, importantly, citizens of the state of West Virginia. Proven strategies, such as community-based surveys and public health data analysis, should be combined with novel technologies to create open access platforms, where residents can easily access and share information without barriers.

This statewide Needs Assessment will accomplish the following goals:

- 1) Study and provide data and documentation of a common metric of the burden of SUD at the county and state level. This should allow for comparison of addiction rates between municipalities, counties, and the state. The measure should allow for ongoing measurement to assess if rates of addiction are changing over time.
- 2) Study and provide documentation of the current status of addiction services and dollar amounts invested at the county and state level across all funding sources (state, federal, private, etc.). The Needs Assessment shall define a set of core foundational addiction services that should be available to all West Virginia residents. This may be done through research, interviews with subject matter experts, board members, policy makers, community members, outside guidance, etc. This should be structured similarly to the Foundational Public Health Services.
- 3) Using the data, information, and documents produced under Goals 1 and 2 above, study and provide documentation of current gaps and supply of services in the addiction care continuum.

- 4) Produce a public-facing dashboard that will show items Goals 1, 2, 3, in a way that allows for rapid analysis of where to deploy future investments.
- 5) Produce a common definition of Health Return on Investment (HROI) and assess each addiction or related service by its HROI Apply the HROI methodology to areas that need new addiction services investments and allow for the future development of an objective scoring methodology to allow for the Foundation to prioritize funding based on supply, demand, and HROI.
- 6) It is intended that this Needs Assessment and resulting dashboard will be publicly available and can be used by state and federal partners
- 7) It is intended that this Needs Assessment will be the foundation by which the Foundation can make objective decisions about the supply, demand, and HROI of proposed projects.
- 8) It is intended that many of the definitional components of the Needs Assessment will be done in close conjunction with the Foundation staff and board members - such as determination of HROI, foundational addiction services, common metric of SUD burden, and other components.

Key capabilities required to complete this Needs Assessment must include:

1. Modern Methodologies: Utilizing advanced statistical tools, predictive analytics, and real-time data collection. This Needs Assessment must enable more responsive, adaptive, and foundational decision-making.
2. Heat Mapping: This Needs Assessment should visualize opioid use, overdose rates, and treatment availability using social determinants of health and geographic information systems (GIS) to reveal high-risk areas and underserved communities. Spatial data will guide resource allocation more precisely.
3. Living Data Collection: This Needs Assessment should continuously and dynamically capture data, allowing for updated insights in real time. This should include information from healthcare providers, first responders, and community outreach programs, to create a constantly evolving and fully interoperable, state, regional, county, and municipal understanding of needs.
4. Transparency and Public Engagement: To support grantmaking and encourage engagement, data shall be accessible through various public-facing portals and dashboards. To ensure broad access and implementation, it is crucial that content be presented in clear, straightforward language with supporting visuals (where applicable).

By leveraging these advanced tools and keeping transparency at the forefront, West Virginia can better address the opioid crisis through targeted, effective intervention and support at every level of the state. This approach will inform both the West Virginia First Foundation's strategic goals and financial support decisions across the state.

These initiatives build upon research and insights from both local and national studies addressing opioid misuse and community resilience.

It is essential that the Needs Assessment maintains objectivity throughout the process.

The MOU outlines an ambitious and significant response to West Virginia's opioid crisis. With the task of administering and monitoring investments, the Foundation has an opportunity to lead transformative change that will literally save lives. The Foundation's investments over the next three years are critical.

The complexity of the current system, which includes funding, service delivery, and data availability, makes it challenging to determine the most effective allocation of new resources, despite awareness of the negative consequences of substance use and the existence of a continuum of services from prevention to recovery. A strategic Needs Assessment will enable the Foundation to pinpoint needs and gaps related to the four priority areas and ensure that new resources are directed appropriately.

Priority Areas:

1. Treatment availability (particularly of evidence-based strategies),
2. Prevention
3. Awareness education, and,
4. Enforcement

Additionally, the Needs Assessment should address the challenges associated with data interoperability that currently confront the Foundation.

Recommendations:

Although statewide data clearly illustrates the magnitude of the problem, data that pinpoints the precise location and extent of current and planned services and initiatives across the state is fragmented and, in some instances, missing altogether. A targeted and comprehensive Needs Assessment can gather (and where necessary, collect) information to assist the Foundation in effectively allocating resources across the four priority areas, as well as geographically throughout the State.

To meet both current and future requirements, the Foundation seeks a multifaceted approach to determine needs and gaps in the four priority areas, while also establishing long-term data interoperability solutions. The Needs Assessment should comprise the following activities:

1. Analyze existing administrative and programmatic data sources, including but not limited to Medicaid, MATCH, WV Office of Drug Control Policy, and state-administered education, intervention, treatment, and overdose reversal programs. This analysis should identify current service recipients, compare this population to the population in need, and assess equity issues, including geographic disparities in service delivery and/or outcomes.

2. Gather programmatic data to supplement existing data sources and sufficiently address unanswered questions.
3. Assess readiness and identify gaps in the system and across the state within each of the 4 priority areas by gathering input from key stakeholders to validate results.
4. Assess data interoperability status and requirements. Sections F5, F6, and H5 of the MOU and sections 5.3 and 5.4 of the Public Access Policy call for a type of data system emphasizing "retrieval." These types of systems promote recall of information for specific individuals, organizations, funding requesters, etc. They are meant to recall values and information (e.g., much like a library system or typical patient records in a healthcare system). This is quite different from sections J2 and J3, which demand that data systems be geared for analysis. This type of system emphasizes trends, patterns, and systematic analysis across a broad range of data for purposes of collective or organizational decision-making. These data structures - retrieval versus analysis - are the key problem in endeavors like the Foundation's. The first task in constructing the proper data architecture is delineating which data sets are critical for the tasks laid out in the MOU and the Public Access Policy. The general process for construction of a data system that addresses the diverging needs of the Foundation is as follows:
 - a. Problem definition - Defining the key substantive features of the problems the Foundation is charged with solving. The MOU and Public Access Policy provide guidance on these issues.
 - b. Data cleaning and organization - Once relevant data are prioritized, they are cleaned and given an organization that promotes the interoperability required by both retrieval and analytical tasks.
 - c. Data integration and curation - The Foundation's core difficulty is a component-driven problem such that policy coherence is dependent on getting different components to work together. This means getting the data to speak to each other, but it also means something far beyond the typical relational database for retrieval. Data must be curated to answer specific questions of relevance to the public, providers, and to Foundation itself.
 - d. Data analysis - The Needs Assessment should provide recommendations for requisite investments, including costs, data sharing, and data management protections, and associated MOUs that may be necessary.

III. FORMAT; LENGTH; DEADLINES

Formal, written responses to this RFP are due by April 18, 2025, by PDF file transmitted by email to the Foundation c/o Romeo Tan at RFP@wvfirst.org (the "Foundation Contact"). Your email subject line must include "Response to Needs Based Assessment RFP." Each response is limited to the equivalent of 25 pages with dimensions of 8" by 11". If you do not receive a confirmatory response within 24 hours, you are obligated to reach out to the Foundation Contact for confirmation. The Foundation is not responsible for failure to receive your response.

The schedule of deadlines for the RFP is described below. The Foundation in its sole discretion and for any reason reserves the right to vacate, extend, or modify part or all of the schedule of deadlines. In such cases, the Foundation will notify each potential or actual Respondent for which the Foundation has contact information. Any notice of vacation, extension, or modification of the schedule of deadlines for the RFP will be posted to the Foundation's website. The Foundation will not extend the deadline to accommodate any single potential Respondent irrespective of its unique circumstances. If you have any questions or need additional information, email the Foundation Contact.

DEADLINE	ACTION
March 14, 2025	RFP released
March 21, 2025	Deadline to submit questions to the Foundation
March 28, 2025	Answers given to all Respondents
April 18, 2025	Response deadline

IV. GENERAL

The Foundation invites each potential Respondent to give the Foundation its notice of intent to submit a Response; however, no potential Respondent is required to give the Foundation a notice of intent to submit its response as condition to the Foundation's consideration of its Response so long as the Response is timely submitted. Notices of intent will be and remain confidential until after any award.

The Foundation may make reasonable investigations to determine the ability of the Respondent to perform the services in this RFP, including requesting additional information, documents, and data. Upon the Foundation's written request, the Respondent shall furnish all such information and data for this purpose. A request for additional information from the Foundation shall not extend any deadline for Respondents.

By submitting a Response, a Respondent certifies to the Foundation that it will conform to the Federal Civil Rights Act of 1964, as amended, the West Virginia Human Rights Act and analogous laws and statutes of the United States and of West Virginia; and that the Respondent will not discriminate against any employee or applicant for employment with the Respondent because of race, religion, color, sex, sexual orientation, national origin, age, disability, or any other basis prohibited by federal or state law relating to discrimination in employment, except where there is a *bona fide* occupational qualification reasonably necessary to the normal operation of the Respondent.

The Board will determine the finalists and winning proposal or proposals in its sole discretion based on its review of the responses.

The Foundation shall be the sole owner of all intellectual property, materials, software, applications, programs, or any materials developed as part of the Needs Assessment, and reserves full rights to the work produced. All materials will be solely branded with the Foundation's logos. Nothing will be disseminated or distributed without the sole approval of Foundation staff. Respondents shall execute any agreements, contracts, or other documents as may be necessary, as determined in the sole discretion of the Foundation, to ensure ownership of all intellectual property and materials is vested in the Foundation.

The name of respondents and awardees may be made public by the Foundation.

V. RESPONSES AND MATERIALS

A. General Terms and Conditions

1. Submit any written Notice of Intent to Respond, together with contact information, by PDF file transmitted by email to the Foundation Contact. The Foundation invites each potential respondent to give the Foundation its notice of intent to submit a Response; however, no potential respondent is required to give the Foundation a notice of intent to submit its response as condition to the Foundation's consideration of its Response so long as its Response is timely submitted.
2. Submit your Response by PDF file transmitted by email to the Foundation Contact. The Response must be received by the Foundation before or on the deadline.
3. The Foundation reserves the right in its sole discretion to reject any and all Responses, to waive any irregularities in or omissions from any Response or the Request for Proposal process, and to negotiate or hold discussions with any Respondent.
4. In its sole discretion, the Foundation may decide to choose no Response for an award of a contract. In its sole discretion, the Foundation may, after submission of the Responses, choose to request additional information from any Respondent.
5. The Foundation may select one or more Respondents for contracts with the Foundation. The recommendation of or award to a Respondent of a contract with the Foundation shall not bind the Foundation. The selection of one or more Respondents for contracts with the Foundation shall not bind the Foundation. Notwithstanding anything stated in this RFP, no award or contract shall be final until executed by the Foundation and the awardee. The Foundation may terminate any award, negotiations, or other action prior to the consummation of the final contract between the Foundation and awardee.
6. If the Foundation selects one or more Respondents, then it intends to proceed to negotiate, approve and execute one or more contracts with the successful

Respondent or Respondents. The negotiation of any contract shall not bind the Foundation.

7. If you have any questions, contact by email the Foundation Contact.
8. By submission of a response to this RFP, you agree to the terms included within.

Responses must cite each item below and provide a response:

B. Primary Information, History, Experience and Conflicts

1. Describe yourself or your firm, including a brief history, corporate structure, and a description of your advisory model.
2. Give your local servicing office contact information, including primary contacts. Include the address, telephone number, email, and website.
3. Give biographies of the servicing team, including biographies of the primary advisors whom you propose to work with the Foundation.
4. Disclose conflicts of interest, including the appearances of conflicts in their absence. If conflicts or the appearances of conflict exist or would exist, how would you or your firm address them?
5. Describe any material litigation, regulatory, or legal proceedings in which you, including against individuals and parent entities, subsidiaries, or affiliates or any of the principals, are or have been involved over the five years preceding the date of your response.
6. Describe ancillary services that would benefit the Foundation.
7. Describe your history of or commitment to social responsibility through philanthropy, volunteering, *etc.*, specifically in West Virginia communities.
8. Provide examples of previous work (if available) for review - Including previous policy analysis or white papers authored, dashboards created, health economics or actuarial experience, public health and public engagement experience and work, among other relevant work.
9. Provide a detailed and comprehensive description of your approach to completion of the Needs Assessment, including but not limited to your approach and experience related to assessing supply and demand for addiction services, determining how to assess foundational addiction services, data sources you will need to collect and how you will collect them, technical needs and assets in order to analyze and interpret the data, how you will approach determining HROI of addiction services, and experience in dashboard development.

C. Fees

1. Describe your fee structure as it relates to the Needs Assessment and related work.
2. Describe any *ad hoc* fees.
3. Please describe any additional fees that you might possibly charge in the course of performing your services applicable to the relationship.