

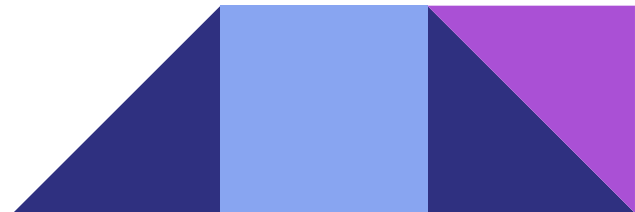


# DukeEngage 2021: MedHealth

Neal Dalal and Isabel Hogshire

# Who is MedHealth?

- Regional collaboration led by Stacey Frankovich (Program Manager, MedHealth at TechTown) and Paul Riser (Director, Detroit Urban Solutions at TechTown)
- Focused on **convening**, **connecting**, and **educating** the medical innovation ecosystem in Southeast Michigan and Southwest Ontario
- Driven by a steering committee composed of healthcare providers, universities, investors, and innovators
- **THE GOAL: Accelerate the adoption of technologies that improve the quality of care and contribute to economic growth in the region**



# The Initial Task

Facilitate a transfer between Clique to Zoho client relation manager (CRM) by:

1. *Researching historical documents and background on MedHealth*
2. *Research and learn about the Clique and Zoho platforms*
3. *Prepare client information for transfer*
4. *Conducting exports of data and preparing the data for upload into the new system*



# The Deliverables:

*Client Master-List*  
*Connections*  
*Intake Form*  
*User Stories*

# Client Master-List



# Connections

Description:

1. Export all 1700+ data points from Clique and MailChimp
2. Merge and Clean data
3. Find any instances of misnamed companies and uniformly name them
4. Find websites for all the companies

**Go through the notes of all the clients and create a spreadsheet with who Stacey connected to who**

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# “What we did”

Description:

Instead of manually siphoning through thousands of data points ....

We implemented code!

And of course hand checked all our work

```
In [6]: for i in list_items:
        c_base[i] = np.nan
```

```
In [7]: c_base = c_base.fillna("RemoveLater")

        for i in c_base.index:
            items = c_base.iloc[i]["Lists"].split(",")
            for k in items:
                c_base.at[i, k] = "X"
```

```
In [8]: c_base = c_base.replace("RemoveLater", np.nan)
```

```
In [9]: #company = c_base.groupby("Company")
        #import Levenshtein as lev
        from fuzzywuzzy import fuzz
        companies = []
        [companies.append(x) for x in c_base["Company"] if x not in companies]
        companies.remove(np.nan)
        companies.sort()
        #company_list = company_list.dropna()
```

```
In [10]: similiar = set()
        c_base["companies_fixed"] = [i for i in c_base["Company"]]
        for i in range(len(companies)):
            for k in companies[i+1:]:
                Str1 = companies[i]
                Str2 = k
                Ratio = fuzz.ratio(Str1, Str2)
                #Partial_Ratio = fuzz.partial_ratio(Str1, Str2)
                #Token_Sort_Ratio = fuzz.token_sort_ratio(Str1, Str2)
                #Token_Set_Ratio = fuzz.token_set_ratio(Str1, Str2)
                if Ratio > 68 and Ratio < 100: #or Partial_Ratio > 40:
                    similiar.add(companies[i])
                    temp = c_base[c_base["Company"] == k].index.values
                    for j in temp:
                        c_base.at[j, "companies_fixed"] = companies[i]
```

# Intake Form

## Description:

- A new intake form would allow relevant information to be directly recorded in Zoho and help Stacey prepare for initial meetings
- Key Information: Raised money? Company stage? Resources have they utilized?

MedHealth Intake Assessment

**Preliminary Assessment**

What type of technology is your innovation?

Medical Device <Checkbox>

Digital Solution <Checkbox>

Who will you likely sell this technology or service to??

Health System <Checkbox>

Direct to Consumer <Checkbox>

3rd party distributor <Checkbox>

Unknown <Checkbox>

Other <Text Box>

Who is the user of your technology or service?

Clinician <Checkbox>

Patient <Checkbox>

Administration <Checkbox>

Caregiver / Family <Checkbox>

Other <Text Box>

1) What problem does your technology or service solve?

A) How does your product or service directly address the problem?

B) What are the key benefits of your product or service?

2) Who are your competitors?

# User Stories

Description: Describe how MedHealth would to interact with a specific user in order to identify the different functionalities they need from Zoho

	A	B	C	D	E	F
1		<b>MedHealth Zoho Migration User Stories</b>				
2		<b>As a [description of user]</b>		<b>I want [a functionality]</b>		<b>So that [a benefit or outcome happens]</b>
3	As a	MedHealth Program Manager	I want	capture referrals from the ecosystem	so that	we can report out on connections made
4	As a		I want		so that	
5	As a	MedHealth Program Manager	I want	to know the type of company Digital or Device	so that	I can better assist them with the right resources.
6	As a	MedHealth Program Manager	I want	to know the sector their technology serves (such as cardio, ortho, sensors or monitoring)	so that	I can sort by sector when health systems requests specific solutions.
7	As a	MedHealth Program Manager	I want	Funding to date (use INVESTMENTS as term)	so that	I can create a baseline for the company to track additional funding
8	As a	MedHealth Program Manager	I want	New funding reported	so that	I can document new money in for EDA
9	As a	MedHealth Program Manager	I want	Number of employees	so that	I can create a baseline for the company to track additional jobs created
10	As a	MedHealth Program Manager	I want	New employees	so that	Track jobs created for EDA
11	As a	MedHealth Program Manager	I want	To know where (country) there solution is located	so that	I can demonstrate what countries are interacting with MedHealth and direct them to the right resources
	As a	MedHealth Program Manager	I want	Company stage	so that	determine the right resources




# The Challenge:

- **How could we make ourselves useful to MedHealth given that the Zoho team didn't need more assistance?**
  - We overcame this challenge through communication and collaboration with Stacey and personal initiative
  - We set aside time in during our weekly check-in to articulate our goals for the summer and propose our own project ideas
- **Around this time MedHealth received a BIG grant from the Economic Development Association (EDA)...**

## EDA Grant Details

- Goal of the investment: build on existing efforts to enhance and scale MedHealth
- EDA support will assist in revitalizing the region's economy through the COVID-10 crisis
- It is estimated that this project will create and retain at least 110 jobs and leverage \$25 million in private investment
- Main projects include: Improving a commercialization Pathfinder, developing a **new collaboration platform**, designing med-tech events, and expanding MedHealth's regional presence



...**The EDA** grant lead to new individual projects based on MedHealth's needs and our personal areas of interest



# Neal's Projects

The Collaboration Platform

# Finding Inspiration

+

# Reaching Out

- **Research**
  - **Finding similar platforms**
- **How did they do it?**
- **Where did they go wrong?**
- **What insights do their ideas bring?**



# Isabel's Project (1): EDA Grant Summaries

- Stacey Requested high-level summaries of the procurement process and request for proposal (RFP) process
- **As a recipient of a Federal grant, MedHealth has agreed that all procurement transactions will be in accordance with the Uniform Administrative Requirements**
  - Background on general procurement standards and methods of procurement
  - Different methods of procurement
- **The RFP is a project announcement to be posted publicly by MedHealth indicating that bids for contractors to build the website are being sought**
  - Goals/requirements for RFP
  - Potential RFP outline and examples
  - Essential questions for contractors

# Isabel's Project (1): EDA Grant Summaries

To: Stacey Frankovich  
From: Isabel Hogshire (DukeEngage Fellow)  
Subject: Procurement Process Resources  
Date: June 22, 2021

## Executive Summary:

As a recipient of a Federal grant, MedHealth has agreed that all procurement transactions will be in accordance with the Uniform Administrative Requirements 2 C.F.R §§ 200.317 through 200.327. This memo provides a high-level summary of these requirements as well as resources to better understand this process.

## Background on General Procurement Standards

- The [Code of Federal Relations](#) (C.F.R.) provides general procurement standards that apply to MedHealth (TechTown).
- MedHealth must only award contracts to entities that are able to comply with these standards.
- C.F.R. also emphasizes the importance of avoiding conflicts of interest.
- MedHealth must provide full and open competition for potential contractors and have written procedures for procurement transactions

## Methods of Procurement

- C.F.R. breaks down procurement methods into three categories: informal procurement, formal procurement, and non-competitive procurement.
- Informal procurement: When the value of the procurement for property or services under a Federal award does not exceed the simplified acquisition threshold (SAT) of \$250,000.
  - Micro-purchases, Small purchases under \$10,000
- Formal procurement: When the value of the procurement for property or services under a Federal award exceeds the SAT, formal procurement methods are required.
  - Sealed bids, Proposals (RFP)
- Non-competitive procurement: There are specific circumstances in which non-competitive procurement can be used.
  - The dollar amount does not exceed the micro-purchase threshold (determined and documented by MedHealth; may be increased up to \$50,000 in accordance with Federal Acquisition Regulations (FAR))
  - The item is only available from a single source
  - Public emergency/exigency
  - MedHealth writes a specific request and receives approval from the federal awarding agency
  - Competition is determined inadequate after evaluating a number of sources
- MedHealth must take all necessary affirmative steps to assure that minority business enterprises, women's business enterprises, and labor surplus area firms are used when possible.
- MedHealth should preference domestic procurements

To: Stacey Frankovich  
From: Isabel Hogshire (DukeEngage Fellow)  
Subject: Request For Proposal (RFP) for Website Build  
Date: June 22, 2021

## Executive Summary

- The RFP is a project announcement to be posted publicly by MedHealth indicating that bids for contractors to build the website are being sought
- The RFP will define the project for MedHealth as well as respondents
- The RFP will describe the project, its objectives, MedHealth as an organization, as well as the bidding process and contract terms
- The goal of the RFP is to establish a partnership with a potential website creator; RFP must provide a detailed context to understand MedHealth's needs

## Background Information

- Issuing an RFP may require a number of sub-contractors
  - Consultant: Responsible for understanding MedHealth's needs and articulating those needs within the RFP; responsible for selecting qualified vendors
  - Procurement Professional: Coordinates the creation of the RFP; monitors progress

## Gathering RFP Requirements

- Articulate the project's purpose: Collect information from stakeholders (health systems, innovators, private sector) about the need MedHealth is addressing
- Establish clear goals: What would a successful outcome look like?
- Determine evaluation criteria: How will you score proposals? What are the most important factors to consider?

## Potential RFP Outline and Examples

1. Project Summary and Goals
2. Company Information
  - a. About Information
  - b. Competitors
3. Website Audience
  - a. Types of Users
4. Site Structure and Content
5. Graphic Design
6. Functionality
7. Budget (hosting and maintenance)
8. Vendor Selection Process and Criteria
9. Timeline

[https://www.energystar.gov/ia/partners/bldrs\\_lenders\\_raters/downloads/Enterprise\\_Rater\\_RFP\\_Template.pdf](https://www.energystar.gov/ia/partners/bldrs_lenders_raters/downloads/Enterprise_Rater_RFP_Template.pdf)

<https://www.techsoup.org/SiteCollectionDocuments/sample-rfp-web-building-document.pdf>


# Isabel's Project (2): Communications Materials

AutoSave ON | About MedHealth Info 2021 | Last Modified: June 16

Home | Insert | Draw | Design | Transitions | Animations | Slide Show | Review | View | Tell me


Paste | Cut | Copy | Format | New Slide | Layout | Reset | Section | Helvetica | 26 | A<sup>+</sup> | A<sup>-</sup> | A<sub>0</sub> | B | I | U | | | | | | | | | | | | | | | | | | | | | | | | | Share | Comments


1




2

**THE TEAM**

 **Stacey Frankovich**  
Program Manager, MedHealth,  
at TechTown Detroit

 **Paul Riser**  
Director, Detroit Urban  
Solutions, at TechTown Detroit



3

**ABOUT MEDHEALTH**

- MedHealth is a program located at TechTown Detroit
- Founded in 2015 when stakeholders in southeast Michigan and southwest Ontario teamed up to meet gaps in the regional healthcare ecosystem
- Driven by a steering committee composed of healthcare payers, healthcare providers, universities, investors, economic development organizations and innovators
- Focused on connection, convening, and education

Click to add notes

Slide 1 of 15 | English (United States) | Notes | Comments | 82%



# Isabel's Project (3): MedTech Asset Map

	A	B	C	D	E	F
1	Name	Org. Type	Website	Description	Location	MedTech Specific
2	MedHealth	Regional Collaborative	<a href="https://medhealthinnovation.org/">https://medhealthinnovation.org/</a>	MedHealth convenes innovators and investors	Detroit, MI	X
3	TechTown Detroit	Entrepreneurship	<a href="https://techtowndetroit.org/">https://techtowndetroit.org/</a>	Helps both tech and non-tech startups	Detroit, MI	
4	The Underground	Incubator Program	<a href="https://www.startunderground.com/">https://www.startunderground.com/</a>		Port Huron, MI	
5	XLerate Health	Accelerator	<a href="https://www.xleratehealth.com">https://www.xleratehealth.com</a>	Supporting XLerateHealth is a	Flint, MI	X
6	Michigan Life Science and Innovation Center	Entrepreneurship	<a href="https://mlsic.com/">https://mlsic.com/</a>	The Michigan Life Science and Innovation Center	Plymouth, MI	X
7	Midwest Regional U.S. Patent & Trademark Office		<a href="http://uspto.gov/detroit">http://uspto.gov/detroit</a>	Provides general information and assistance	Detroit, MI	
8	Entrepreneurs Hub	Lab Space	<a href="http://entrepreneurshub.space">http://entrepreneurshub.space</a>	Co-working space offering an incubator	Detroit, MI	
9	Detroit Health Department	Gov. Agency	<a href="http://detroitmi.gov/health">http://detroitmi.gov/health</a>	Provides public health services	Detroit, MI	
10	Grand Circus	Accelerator	<a href="http://grandcircus.co">http://grandcircus.co</a>	Provides 10-week coding bootcamp	Detroit, MI	
11	Endeavor Detroit	Accelerator	<a href="http://endeavordetroit.org">http://endeavordetroit.org</a>	Helps high-impact entrepreneurs	Detroit, MI	
12	Invest Michigan	Funding	<a href="http://investmichigan.org">http://investmichigan.org</a>	Funding for innovative, early stage startups	Detroit, MI	
13	Goldman Sachs 10,000 Small Businesses	Entrepreneurship	<a href="http://10ksbdtetroit.com">http://10ksbdtetroit.com</a>	A program that coaches entrepreneurs	Detroit, MI	
14	Detroit Score	Entrepreneurship	<a href="http://detroit.score.org">http://detroit.score.org</a>	Provides business tools and templates	Detroit, MI	
15	ACCESS Growth Center		<a href="http://accessgrowthcenter.org">http://accessgrowthcenter.org</a>	Provides business training, business plan	Dearborn, MI	
16	Michigan Manufacturing Technology Center		<a href="http://mmtc.org">http://mmtc.org</a>	Operational assessments, process improvements	Plymouth, MI	
17	WMed Innovation Center	Incubator and Co-Incubator	<a href="https://med.wmich.edu/node/373">https://med.wmich.edu/node/373</a>	The WMed Innovation Center	Kalamazoo, MI	X
18	Michigan Biomedical Venture Fund	Funding	<a href="https://cfe.umich.edu/mbvf/">https://cfe.umich.edu/mbvf/</a>	The Michigan Biomedical Venture Fund	Ann Arbor, MI	X
19	Start Garden	Accelerator and Incubator	<a href="http://startgarden.com/">http://startgarden.com/</a>	Start Garden empowers West Michigan startups	Grand Rapids, MI	
20	Michigan Economic Development Corporation	Economic Development	<a href="https://www.michiganbusiness.org/">https://www.michiganbusiness.org/</a>	The Michigan Economic Development Corporation	Lansing, MI	
21	Central Michigan University Research Corporation	Accelerator	<a href="https://www.cmurc.com">https://www.cmurc.com</a>	CMURC is a nonprofit organization	Mount Pleasant, MI	
22	Detroit Economic Growth Corporation	Economic Development	<a href="http://degc.org">http://degc.org</a>	Detroit's leading economic development organization	Detroit, MI	
23	Opportunity Resource Fund	Funding	<a href="http://oppfund.org">http://oppfund.org</a>	Provides loans and technical assistance	Detroit, MI	
24	Detroit Development Fund	Funding	<a href="http://detroitdevelopmentfund.com">http://detroitdevelopmentfund.com</a>	Provides capital and technical assistance	Detroit, MI	
25	BUILD Institute	Entrepreneurship	<a href="http://buildinstitute.org">http://buildinstitute.org</a>	Business planning classes, and mentorship	Detroit, MI	
26	U.S. Small Business Administration	Economic Development	<a href="http://sba.gov/mi">http://sba.gov/mi</a>	Provides counseling, training, and financing	Detroit, MI	
27	Michigan Medical Device Accelerator	Accelerator	<a href="https://mmdaccelerator.com/">https://mmdaccelerator.com/</a>	MMDA provides an opportunity for medical device startups	Kalamazoo, MI	X
28	QII INC.	Accelerator	<a href="https://www.oakland.edu/qiinc/">https://www.oakland.edu/qiinc/</a>	QII INC is a SmartZone Business Incubator	Rochester, MI	

# Key Takeaways

- Given that MedHealth is comprised of such a small team, our work made a tangible impact
- Although our projects might seem disconnected from one another, they they serve a common purpose: helping to accelerating MedHealth into a new age of efficiency and reach
- **Personal Takeaways:**
- **THANK YOU STACEY!**

