



Request for Proposal #2018-007
PARTNER MANAGEMENT AND COMMUNITY-FOCUSED
INFORMATION SYSTEMS LANDSCAPE ANALYSIS

I. Summary of Deadlines

Release of Request for Proposal	March 8, 2018
Proposals due	March 22, 2018
Selection of short-listed suppliers	March 29, 2018
Interviews with short-listed suppliers	March 29 – April 5, 2018
Bidders notified of decision	April 8, 2018

Note that PATH reserves the right to modify this schedule as needed. All parties will be notified simultaneously by email of any changes.

II. PATH Statement of Business

PATH is the leader in global health innovation. An international nonprofit organization, we save lives and improve health, especially among women and children. We accelerate innovation across five platforms—vaccines, drugs, diagnostics, devices, and system and service innovations—that harness our entrepreneurial insight, scientific and public health expertise, and passion for health equity. By mobilizing partners around the world, we take innovation to scale, working alongside countries primarily in Africa and Asia to tackle their greatest health needs. Together, we deliver measurable results that disrupt the cycle of poor health. Learn more at www.path.org.

III. Project Background

PARTNER MANAGEMENT AND COMMUNITY-FOCUSED INFORMATION SYSTEMS LANDSCAPE ANALYSIS

A. Project Background: USAID/South Africa has requested the Digital Square initiative to put up a solicitation and then pre-qualify, award, and supervise to completion a technically capable consulting firm or contractor that will be responsible for a landscape analysis that looks at both Partner Management Information Systems and Community-focused Information Systems in use by PEPFAR-supported implementing partners across South Africa.

B. Proposed Project Timeline:

Project start date	April 15, 2018
Interim deliverables per scope of work:	
<ul style="list-style-type: none"> ● A documented Virtual Team Planning Meeting at the initiation of the contract/consultancy 	April 15, 2018
<ul style="list-style-type: none"> ● Work Plan before commencement of any outreach or fieldwork is initiated 	April 30, 2018
<ul style="list-style-type: none"> ● Routine updates either verbally or in writing (as mutually agreed) provided to PATH and the USAID/South Africa team 	April 30, March 30, May 30, June 30, 2018
<ul style="list-style-type: none"> ● PowerPoint Presentation at the conclusion of data collection highlighting key findings and recommendations 	June 30, 2018
<ul style="list-style-type: none"> ● Two Draft Landscape Analyses (1. Partner Management Information Systems; 2. Community-Focused Information Systems) to be completed after conclusion of data collection and after receiving preliminary feedback from USAID and CDC 	May 30, 2018 (draft 1) June 30, 2018 (draft 2)
<ul style="list-style-type: none"> ● Two Final Landscape Analysis Report, (1. Partner Management Information Systems; 2. Community-Focused Information Systems) including a catalogue of systems, to be finalized after all feedback is received and incorporated. 	July 30, 2018 (report 1) August 30, 2018 (report 2)
Final deliverable due date	September 15, 2018

IV. Scope of Work and Deliverables

A. Scope of Work:

Background:

USAID/South Africa has requested the Digital Square initiative to put up a solicitation and then pre-qualify, award, and supervise to completion a technically capable consulting firm or contractor that will

be responsible for a landscape analysis that looks at both Partner Management Information Systems and Community-focused Information Systems in use by PEPFAR and other donor-supported implementing partners across South Africa.

A **Partner Management Information System (PMIS)** refers to an electronic tool or set of tools used by an organization to conduct a range of activities, such as: collect and consolidate program data, review program and site performance, analyze program outcomes and impacts, report to funders and internal management teams, and plan for the improvement of activities to achieve their targeted outcomes. A **community-focused information system** is one that assists in the collection, summarization, analysis, reporting and dissemination of data produced at locations away from a direct service health facility. Within community-focused information systems, there are a number of domains in which they operate, including: facilitating community health workers in capturing client information; tracking mobile populations; management, analysis and disseminating of information; and tracking cohorts such as orphans and vulnerable populations (OVC), adolescent girls and young women (AGYW) and patients on anti-retroviral treatment (ART) and/or tuberculosis treatment regimens.

PEPFAR is keenly interested in better understanding the range of information systems from these domains in use across South African implementing partners, how the systems meet specific PEPFAR information needs and sharing that information to facilitate informed decisions when investing in various information systems. A non-exhaustive list of examples of both types of systems is provided for review in Appendix A.

Detailed description of the SOW and Deliverables:

The purpose of this scope of work is to conduct a landscape analysis of the full spectrum of technology tools for partner management and community-focused data management systems in use by a wide range of partners in the South African context. This landscape analysis should result in the development of two separate deliverables:

1. **Final report of PMIS.** This assessment should outline all of the systems reviewed in the assessment including the systems in use, classifying them by relevant features, and highlighting the strengths, limitations, distinctions and implementation costs of each system. This assessment should have a deep focus on the architectural requirements behind the respective systems. Additional key areas to be explored are system interoperability, data quality, data security and data management. This report should conclude with a recommendation on which is the most robust and ideal system to be adopted by PEPFAR partners and, if needed, how this system can be adapted and customized to meet PEPFAR indicator reporting needs.
2. **Final report of Community Focused Information Systems.** This assessment should review systems which support HIV prevention, testing and treatment. This report should have two separate components of systems deployed in South Africa as well as some that are widely scaled global goods outside of South Africa: 1) Community-based care systems including those linked with mHealth platforms that are used by community health workers and connect community health workers with facilities and 2) Systems that feature specific cohorts on treatment including OVC, Adolescent Girls and Young Women (AGYW) and Key Populations (i.e., populations at high risk for contracting HIV). Both sections of this assessment should include systems in use, classifying them by relevant features, and highlighting the strengths, limitations, distinctions and implementation costs of each system. A deep focus on the architectural requirements behind the respective systems should be included. This report should also reference how each system links with national frameworks and strategy. This report should include recommendation of how specific existing high functioning systems can be further adapted to facilitate interoperability with provincial data centers.

The team will work under the supervision of PATH in collaboration with USAID and CDC. Additional partners may also be brought in to support the consultancy team and the vendor is expected to work in coordination and collaboration with all partners.

The scope of work will be implemented following the broad phases outlined below:

Phase One: Crystallize Objectives

- Finalize agreement with PATH, adhering to USAID rules and regulations.
- Conduct at least one virtual team planning meeting in conjunction with USAID, CDC, PATH and other relevant partners. This meeting will allow USAID and CDC to review the purpose and expectations of the assignment, and for the team to clarify any objectives and deliverables required.
- Based on the discussions, the team will present to USAID and CDC initial ideas on the approach and methodology for completing this assignment (slide deck).
- The team will document the discussion, agreements and finalize clearly-defined deliverables to result from this assignment.

Phase Two: Define Detailed Scope and Methodology

- Based on the objectives outlined in this scope of work, the consultancy team will develop a detailed scope for the assignment, which will include, at a minimum:
 - a description of the evaluation methodology and tools to be used, defining distinctions between desk-based reviews and field work/site visits to evaluate systems
 - a detailed list of the functions and data elements that will be reviewed and documented for each type of information system (a review of broad information needs may be used as a reference)
 - a work plan showing key milestones and deliverables
 - a staffing plan that details the technical skills of the staff conducting the assignments
 - a summary of all identified risks or barriers to completion of the assignment, likelihood of those risks occurring, as well as mitigation plans for those risks.
- The work plan and methodology must be approved in writing by PATH and USAID/South Africa in advance of the commencement of data gathering.

Phase Three: Conduct Data Gathering

- Initiate both literature review and outreach to potential stakeholders to identify information systems for review
- Develop template structure for cataloguing identified and reviewed systems
- Conduct on-site interviews with organizations that have developed and/or deployed the identified systems as well as end-users to document:
 - systems functionalities and securities
 - platforms on which they are built (i.e., databases, web versus device-based, open versus proprietary software)
 - Robustness (ability to scale) and application of open standards which facilitate information exchange between information systems
 - known bugs/technical issues
 - technical implementation and staffing requirements
 - user experience
 - cost estimates for development or purchase, deployment and maintenance
- Hold a debriefing with PATH, USAID and CDC to share initial findings from the data gathering exercise.

Phase Four: Analysis, Synthesis and Presentation of Initial Findings

- Conduct detailed analyses of the identified information systems for strengths, weaknesses, suitability for USAID and CDC partners, total cost of ownership and sustainability.
- Synthesize results of analyses into consumable format to be shared and discussed with PATH, USAID and CDC.
- Present and discuss initial findings with PATH, USAID and CDC.

Phase Five: Finalization, Submission and Acceptance of Deliverables

- Based on the presentation and feedback from the initial findings meeting, finalize all key findings, documentation and recommendations into a shareable format (as agreed with PATH, USAID and CDC at the initiation of the project)
- Submit the final report and deliverables to USAID and CDC for review and approval.
- Obtain written confirmation from USAID/South Africa that final deliverables have been reviewed and accepted.

The key deliverables for this consultancy will include:

- **A documented Virtual Team Planning Meeting** at the initiation of the contract/consultancy
- **Work Plan** before commencement of any outreach or fieldwork is initiated
- **Routine updates** either verbally or in writing (as mutually agreed) provided to PATH, USAID, and the CDC teams, on at least a monthly basis during the assignment
- **PowerPoint Presentation** at the conclusion of data collection highlighting key findings and recommendations
- **Two Draft Landscape Analyses (1. Partner Management Information Systems; 2. Community-Focused Information Systems)** to be completed after conclusion of data collection and after receiving preliminary feedback from USAID and CDC
- **Two Final Landscape Analysis Report, (1. Partner Management Information Systems; 2. Community-Focused Information Systems)** including a catalogue of systems, to be finalized after all feedback is received and incorporated.

Written confirmation provided to the team that final deliverables have been accepted by PATH and USAID/South Africa will indicate the completion of the project activities.

Consultancy Team Requirements:

USAID and CDC through Digital Square (PATH) are looking for a lean team with specialized skills related to systems mapping, information system design, and user experience. The team should have relevant knowledge and experience related to HIV/AIDS service delivery programs (i.e., prevention, care and treatment) and the principles of digital development: design with the user; understand the existing ecosystem; design for scale; build for sustainability; be data driven; use open standards, open data, open source, and open innovation; reuse and improve; address privacy and security; and be collaborative. The team should have extensive knowledge of PEPFAR and the health system context in South Africa including national health frameworks. Experience supporting NGOs and donors assess and expand initiatives in South Africa is desired. The ideal team would have a robust portfolio of experience in technology/digital system assessments, data synthesis, ability to analyze information and validate recommendations that will impact health system scale, efficiencies and overall strengthening.

Period of Performance

Digital Square envisions a 3 to 4-month term for this scope. Target completion by end of June 2018.

Appendix A: Health Information System Assessment

Partner Management Information Systems, from the District Support Partners:

- Anova
- Aurum
- Broadreach
- Foundation for Professional Development
- Health Systems Trust
- Kheth'impilo
- MatCH
- Right to Care
- TB/HIV Care
- Wits Reproductive Health Institute

Systems include:

- Vantage (Broadreach)
- Qode (Right to Care/Foundation for Professional Development)
- Aurum Institute
- DHIS2 (PSI in-house instance)
- M&E and internal systems for 10 DSPs (list will be provided once subaward is signed)

Community-Focused Information Systems to support HIV prevention, treatment and care:

- Community Health Workers and Community Based Care Systems
 - AitaHealth (Mezzanine)
 - The HISP/ASG CHW system
 - Mobenzi App (implemented in North West)
 - Commcare (DiMagi)
 - Systems used by CIDER if applicable
 - Virtual Purple Health Systems
 - Foneastra
- Systems tracking specific Cohorts on HIV/AIDS Treatment:
 - Orphans and Vulnerable Children (OVC)/Adolescent Girls and Young Women
 - OVC Database (Rob Kearns)
 - Adolescent girls and young women (AGYW)
 - HIVSA systems
 - Goldmine (Soul City)
 - Broccoli
 - Key Populations
 - NACOSA supported systems

B. Deliverables:

<p>Interim deliverables per scope of work:</p> <ul style="list-style-type: none"> ● A documented Virtual Team Planning Meeting at the initiation of the contract/consultancy ● Work Plan before commencement of any outreach or fieldwork is initiated ● Routine updates either verbally or in writing (as mutually agreed) provided to PATH and the USAID/South Africa team ● PowerPoint Presentation at the conclusion of data collection highlighting key findings and recommendations ● Two Draft Landscape Analyses (1. Partner Management Information Systems; 2. Community-Focused Information Systems) to be completed after conclusion of data collection and after receiving preliminary feedback from USAID and CDC ● Two Final Landscape Analysis Report, (1. Partner Management Information Systems; 2. Community-Focused Information Systems) including a catalogue of systems, to be finalized after all feedback is received and incorporated. 	<p>April 15, 2018</p> <p>April 30, 2018</p> <p>April 30, March 30, May 30, June 30, 2018</p> <p>June 30, 2018</p> <p>May 30, 2018 (draft 1) June 30, 2018 (draft 2)</p> <p>July 30, 2018 (report 1) August 30, 2018 (report 2)</p>
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V. Proposal Requirements – Technical

Provide a narrative on your technical approach to accomplish the Scope of Work and Deliverables per section IV, including:

- Description of technical approach.
- Discussion of project management and roles of project team.
- Timeline to meet the deliverables.
- Potential obstacles and plan to overcome them.
- Identification of major internal and external resources.

Provide information on your overall qualifications, including:

- Profile of relevant corporate qualifications.
- Profile of relevant experience and examples of related work.
- Qualifications of key members of the proposed project team (attach CVs and provide details of back-up/standby teams).
- Number of years in business.
- Annual revenue

- If your company has more than one location, please indicate these qualifications for the site that is responding.

VI. Proposal Evaluation Criteria

The following is a list of significant criteria against which proposals will be assessed. The criteria are listed in order of priority however they are not weighted.

- A. Technical – a full technical proposal that adheres to the scope of work and provides at minimum:
 - a. Staffing Plan - consultancy team composition, qualifications and experience
 - b. Data collection methodology
 - c. Data analysis framework and proposal
- B. Experience:
 - a. Demonstrated (past performance record) with evaluative techniques for system design and improvement
 - b. Familiarity with Global Goods software platforms
 - c. Experience with international standards in the health sector
 - d. Project team’s prior engagements with open-source digital health tools
- C. Experience with USAID contracts
- D. Costs (as detailed in Section V)

Note: PATH reserves the right to include additional criteria.

VII. Instructions and Deadlines for Responding

A. PATH contacts

Procurement Contacts: Paris Jones pjones@path.org and Keith Neroutsos kneroutsos@path.org

Technical/Program Contact: Breese McIlvaine, bmcilvaine@path.org

B. Proposals due: March 22, 2018

Completed proposals should be submitted by email to the contacts listed above. The subject line of the email should read: RFP # 2019-007 (your company name).

We advise that you send files in commonly recognized MS formats. We will not accept responsibility for resolving technical transmission problems with proposals. A hard copy of the proposal should not be sent. Your proposal should only include information specific to accomplishing the scope of work. Additional information submitted outside of the proposal requirements will be reviewed at PATH’s discretion only. Elaborate materials, artwork or other information not directly related to the scope of work are not suggested.

E. Selection of short-list

PATH reserves the right to select a short list from the bids received. PATH has the option to interview and discuss specific details with those candidates who are on the short-list.

F. Conclusion of process

Applicants will be notified of PATH's decision by date. Final award is subject to the terms and conditions included in this solicitation, as well as successful final negotiations of all applicable terms and conditions affecting this work.

VIII. Terms and Conditions of the Solicitation

A. Notice of non-binding solicitation

PATH reserves the right to reject any and all bids received in response to this solicitation and is in no way bound to accept any proposal.

B. Confidentiality

All information provided by PATH as part of this solicitation must be treated as confidential. In the event that any information is inappropriately released, PATH will seek appropriate remedies as allowed. Proposals, discussions, and all information received in response to this solicitation will be held as strictly confidential, except as otherwise noted.

C. Conflict of interest disclosure

Suppliers bidding on PATH business must disclose, to the procurement contact listed in the RFP, any actual or potential conflicts of interest. Conflicts of interest could be present if; there is a personal relationship with a PATH staff member that constitutes a significant financial interest, board memberships, other employment, and ownership or rights in intellectual property that may be in conflict with the supplier's obligations to PATH. Suppliers and PATH are protected when actual or perceived conflicts of interest are disclosed. When necessary, PATH will create a management plan that provides mitigation of potential risks presented by the disclosed conflict of interest.

D. Communication

All communications regarding this solicitation shall be directed to appropriate parties at PATH indicated in Section VIII. A. Contacting third parties involved in the project, the review panel, or any other party may be considered a conflict of interest and could result in disqualification of the proposal.

E. Acceptance

Acceptance of a proposal does not imply acceptance of its terms and conditions. PATH reserves the option to negotiate on the final terms and conditions. We additionally reserve the right to negotiate the substance of the finalists' proposals, as well as the option of accepting partial components of a proposal if appropriate.

F. Right to final negotiations

PATH reserves the option to negotiate on the final costs and final scope of work, and also reserves the option to limit or include third parties at PATH's sole and full discretion in such negotiations.

G. Third-party limitations

PATH does not represent, warrant, or act as an agent for any third party as a result of this solicitation. This solicitation does not authorize any third party to bind or commit PATH in any way without our express written consent.

H. Proposal Validity

Proposals submitted under this request shall be valid for 90 days from the date the proposal is due. The validity period shall be stated in the proposal submitted to PATH.