



Request for Proposal RFP # 2017-046

PATH Immunization Data Learnings Facilitation Support

I. Summary of Deadlines

Release of Request for Proposal	6-December-2017
Confirmation of interest	11-December-2017
Fact-finding questions	11-December-2017
Answers to respondent questions	13-December-2017
Proposals due	By 22-December-2017
Selection of short-listed suppliers	By 3-January-2018
Interviews with short-listed suppliers	8/9-January-2018
Conclusion of process	By 10-January-2018

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

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 and Purpose of Request for Proposal (RFP)

A. Project background: Over the past several years, there has been an increase in focused efforts to address the challenges countries face with their data quality and use of data for decisions around health service delivery. The immunization sector has recognized the importance of data and is seeking ways to improve data quality and use, as highlighted in the [Global Vaccine Action Plan \(GVAP\) Strategic](#)

[Objective 4](#), and has been pursuing investments to improve the sector’s understanding of how high-quality data play a critical role in monitoring well-functioning health systems.

The Immunization Data Learnings project has developed a strategy to collect, synthesize, frame, and share evidence-informed learnings and best practices around the improvement of data quality and use to improve immunization outcomes. This effort will build and expand on the work of global organizations and initiatives, including the Better Immunization Data Initiative (PATH), Improving Data Quality for Immunization (Pan American Health Organization), Paper Based Health Information System in Child Care (PHISICC, Swiss Tropical and Public Health Institute, and gravitytank), World Health Organization (WHO), United Nations Children’s Fund, US Centers for Disease Control and Prevention Global Immunization Division, John Snow, Inc., and work funded by Gavi, the Vaccine Alliance, under their Data Strategic Focus Area investments. The outcomes from this proposal will align with the Framework on Immunization Data being developed as a companion to the GVAP by WHO.

This body of work includes three distinct phases to achieve the goal of collecting, collating, and then disseminating the current base of learnings around global efforts to improve data quality and use.

- Phase 1 focuses on identifying key stakeholders to both guide the process and be active participants in gathering the learnings and knowledge. This includes forming a steering committee of core partners who will help to guide the direction of the work to ensure its relevance for multiple agencies, countries, and decision-making bodies and define the boundaries of data quality and use for this effort.
- Phase 2 includes a process for a larger group of stakeholders to review the knowledge gathered, and distill the findings into a concise set of practical and usable learnings targeted to support key stakeholder groups in taking action to improve data quality and use. This phase also involves creating a targeted communications/dissemination plan to share findings, engage partners, drive momentum, and encourage practical application of the learnings. We will then synthesize the findings into multiple formats, highlighting what works, what does not, and the remaining knowledge gaps related to best practices in improving data quality and use in immunization program management.
- Phase 3 focuses on dissemination, executing the communications plan, and supporting a transition of efforts to allow for a high probability of ongoing momentum.

The goal of this project is to frame the learnings in ways that will meet the needs of various audiences to allow for adoption, application, and use by country ministries, implementers, funders, and policymakers. While this output will be developed for the immunization sector, we expect it will also be relevant to the broader global health sector, specifically for those working on overall health systems strengthening, and beyond. This work is extremely timely, taking advantage of the momentum that exists around evidence-based decision-making and providing a platform for country and global stakeholders to share and continue the conversations about how to most effectively improve immunization coverage and overall health.

B. RFP purpose: Select a service provider to help us to prepare for and facilitate a two-day in-person workshop in Washington, DC, for an advisory committee composed of the steering committee and 8–10 other representative key stakeholders (approximately 20 total participants). During this workshop, the advisory committee will review and frame information, knowledge, and evidence gathered during phase 1, including the initial data analysis. The goal of the workshop is to distill the gathered knowledge into a concise set of practical and usable learnings targeted to support key stakeholder groups in taking action to improve data quality and use.

C. Proposed project and deliverables timeline:

Start date	February 12, 2018
Work plan	February 23, 2018
Facilitation agenda (draft)	March 16, 2018
Meeting collateral and facilitation agenda (final)	April 6, 2018
Meeting facilitation (est.)	April 16, 2018
Meeting report (draft)	April 30, 2018
Meeting report (final)	May 15, 2018
End date	May 31, 2018

IV. Scope of Work and Deliverables

A. Scope of work:

We are looking to engage a person or firm to help us prepare for and facilitate a two-day in-person meeting in Washington, DC, for an advisory committee composed of the steering committee and 8–10 other representative key stakeholders (approximately 20 total participants). Activities will include:

- Participate in calls or meetings with PATH and key stakeholders to acquire necessary background knowledge to prepare for and facilitate the meeting.
- Develop detailed facilitation agenda, including objectives, timing, activities, etc.
- Design specific activities and materials for the meeting to support defined objectives and participant interests.
- Facilitate the meeting.
- Provide draft and final meeting reports synthesizing key learnings.

B. Deliverables:

- Detailed work plan.
- Detailed facilitation agenda (draft and final).
- Meeting collateral, including handouts.
- Facilitation services.
- Meeting report (draft and final).

V. Proposal Requirements – Financial

Provide itemized costs for the total scope of this project, based on the scope of work and deliverables outlined in Section IV. The final scope of work may be subject to negotiation; however, bidder selection will be made against the original scope of work. Bids should include itemized costs for key elements of the scope of work, as follows:

- Percent participation in total level of effort according to key staff.
- Rates of key staff.
- Estimated total level of effort and associated costs.
- Itemization of *all other costs*; e.g., agency costs, agency fees, service tax, indirect costs, administrative costs, supplies, etc.
- Estimated schedule of other anticipated expenses (travel, subcontracted resources, supplies, outside resources, etc.).

PATH's available budget for this scope of work is \$20,000.

The budget should not include facility or catering costs for the actual meeting.

Special note on indirect costs

Indirect costs are overhead expenses incurred as a result of the project but not easily identified with the project's activities. These are administrative expenses related to overall general operations and are shared among projects and/or functions. Examples include executive, existing facilities costs, accounting, grants management, legal expenses, utilities, and technology support.

Indirect rate allowances: These rates are maximum allowances. If the organization has lower rates, the lower rates should be used. To the extent that indirect costs are applicable, they are subject to the following limits:

- Up to 10% for US universities and other academic institutions.
- Up to 15% for non-US academic institutions, and all private, voluntary, and nongovernmental organizations, regardless of location.
- No indirect costs will be paid to US government agencies, other private foundations, or for-profit organizations.
- Rates apply to both the primary grantee, subgrantees, and subcontracts that are part of the proposal.

Please note, insofar as possible, identifiable (allocable) costs should be documented and justified in the proposal as direct costs, including those for dedicated ongoing project management and support. Newly acquired facility costs that can be allocable to the project are acceptable as direct costs.

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

VII. 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. *Note: PATH reserves the right to include additional criteria.*

- A. Technical (as detailed in Section VI).
- B. Costs (as detailed in Section V).
- C. Experience (as detailed in Section VI).

VIII. Instructions and Deadlines for Responding

A. PATH contacts:

Procurement contact: Teresa Gingras (tgingras@path.org)

Program contact: Jenny Thompson (jthompson@path.org)

B. Confirmation of interest:

Please send a statement acknowledging receipt of this solicitation and your intent to respond or not respond no later than 7-December-2017. Send the confirmation to the contacts listed above.

C. Fact-finding questions:

Questions on this solicitation will be accepted via email to the contacts listed above through 7-December-2017. Questions and answers will be provided to all participants who confirmed interest per Section VIII.B through 11-December-2017. Please note that responses will **not** be confidential except in cases where proprietary information is involved. Inquiries after this date cannot be accommodated.

D. Proposals due: by 5pm PST 22-December-2017

Submit your completed proposal by email to the contacts listed above. The subject line of the email should read: "RFP 2017-046 PATH facilitation support proposal [firm name]".

We advise that you send files in commonly recognized Microsoft 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 shortlist:

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

F. Conclusion of process:

Applicants will be notified of PATH's decision by 10-January-2018. 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.

IX. Terms and Conditions of the Solicitation

A. Notice of nonbinding 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. 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.

D. 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.

E. 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.

F. 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.

G. 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.