

Request for Application #2020-027

Open Concept Lab Metadata Registry

I. Summary of Deadlines

The expected schedule for this application is outlined in the following table. Note that PATH reserves the right to modify this schedule as needed. All parties will be notified simultaneously of any changes through a modification posted on [Digital Square's website](#).

Release of Request for Application	May 13, 2020
Submission of fact-finding questions to cbowman@path.org	May 15, 2020 at 5pm EDT
All fact-finding questions and answers posted to Digital Square's website	May 18, 2020
Applications due	May 27, 2020 at 5pm EDT
Applicants notified of decision	June 5, 2020

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

A. Project Background

Digital Square is a partnership of the world's leading digital health experts from 40+ organizations working together with countries to strengthen digital health systems. In pursuit of our Mission: **connect health leaders with the resources necessary for digital transformation**, Digital Square offers a new way to invest in digital health—providing a space where countries and members of the global community can gather to think big and do good, together. By convening government officials, technological innovators, donor and implementation partners, and others across borders and boundaries in the Digital Square, we can grow possibility into reality by focusing on our common goal: **connecting the world for better health**. Digital Square works in three key ways:

- Co-investment: We coordinate investments in digital health to maximize the impact of every dollar spent.
- Global goods: We scale tools and technologies that can be adapted to different countries and contexts.
- Digital market readiness: We create digital market readiness by building capacity with governments, local technology developers, and health workers.

Digital Square and our donors are working to support health information exchange by enabling widespread adoption of standards-based interoperability and data exchange best practices by countries and their partners.

Through this RFA, PATH seeks a partnership with a subrecipient that will support the use of standard terminologies and standardized metadata. The work includes development of a generic Metadata Browser that publishes standard terminologies, indicator definitions, and corresponding Health Level 7 (HL7) Fast Healthcare Interoperability Resources (FHIR) and metadata.

B. Proposed Project Timeline

PATH anticipates that subawards will be 12 months and end by June 30, 2021. As part of Digital Square's due diligence, we will conduct pre-award evaluations of all shortlisted candidates. We will use our recipient pre-award survey, informed by USAID's non-US organization pre-award survey (NUPAS) and other industry-wide standards, and customized for Digital Square. In addition to project-specific deliverables based on individual scopes of work, PATH will require applicants to provide, at minimum, quarterly narrative and financial reports to support their work.

IV. Scope of Work and Deliverables

A. Scope of Work

The scope of work is to support the adoption of standard terminologies and standardized metadata, such as indicator definitions. Key terminologies like WHO International Classification of Diseases, 10th and 11th revisions (ICD-10 and ICD-11) would be made available via a FHIR-compatible terminology service.

The work includes the development of a metadata browser that allows for human readability and use with standards-based application programming interfaces (APIs), preconfigured for a production-level deployment of a PEPFAR Metadata Sharing Platform and a World Health Organization (WHO) metadata browser. It will provide access to a starter set of health terminology, FHIR resources, and related metadata maintained by each organization.

Activities should include, but are not limited to:

Development of a metadata browser, which includes:

- Design and development of a generic metadata browser with minimum generic views, such as a hierarchical Open Concept Lab (OCL) view and an indicator mapping view related to PEPFAR Ministry of Health Alignment work, and others to be prioritized with partners.
- Develop connectors to OCL such as to a FHIR sever and DHIS2.
- Provide implementation support for PEPFAR and WHO deployments, including:
 - Support selection of hosting and implementation strategies for PEPFAR and WHO.
 - Support planning for a production deployment of configured implementations of the metadata browser.

Model, publish, and automate maintenance of selected terminology content:

- Public reference or interface terminologies required to support prioritized value sets, which may include: ICD-10, ICD-11, Regenstrief Logical Observation Identifiers Names and Codes (LOINC), HL7 Interoperability Terminology, and others.

- Value sets from WHO Computable Guidelines.

Supporting OCL core API development

- Implement FHIR terminology service and integrate the healthcare enterprise's sharing value sets codes and maps profile in the core OCL API.
- Provide ongoing core support for OCL, including feature enhancements, performance improvements, bug fixes, and refactoring.

Engaging with the digital health and interoperability communities:

- Solicit community input on the metadata information model, presentation, and content.
- Engage with existing communities of practice, including the Open Health Information Exchange (OpenHIE) and Digital Square communities.

B. Deliverables

- Design of an initial version of a more generic OCL metadata browser, including:
 - Basic connectors for the initial implementation, as prioritized based on partner priorities.
 - Build of prioritized features for a production deployment of the OCL metadata browser.
- Development of the generic OCL metadata browser.
- A model of selected terminology content, to be selected based on partner priorities, and mapped to OCL data model, with any gaps identified.
- Load of selected terminology, formatted for import and storage in the OCL data model.
- A documented process for ongoing maintenance and update of terminology and value sets in OCL.
- Configuration requirements for the hosting and implementation strategies, which will be set by PEPFAR and WHO.

V. Application Requirements - Cost

The magnitude of the requirement for this application is up to US\$200,000. This range is just an estimate provided for informational purposes to the offerors and is not binding.

The applicant should provide a detailed explanation of costing and describe the reasonableness of each proposed cost in the budget narrative.

Digital Square will evaluate the quoted prices and hourly rates. No analysis will be performed on quotes determined as non-responsive or if the technical quote is determined to be technically unacceptable. The price/business evaluation will be conducted in accordance with the quoted utility-based solution and proposed labor categories, their rates and Evaluation Matrix. Digital Square will conduct an analysis to determine if all quoted prices are reasonable. This evaluation is conducted with the expectation of adequate price competition and will rely heavily on market forces to determine whether proposed prices are fair and reasonable. The comparison of proposed prices in response to this solicitation is the preferred and intended price analysis technique.

Digital Square will also compare the proposed prices to historical prices paid for the same or similar services and the independent government cost estimate. Other techniques and procedures may be used to ensure quoted prices are fair and reasonable. A cost realism analysis will be performed to determine whether the quoted Level of Effort is realistic for the work to be performed, reflects a clear understanding of the requirements and is consistent with the unique methods of performance set forth in the company's technical quote.

Required Elements

The Cost Application must include a budget narrative, detailing the cost and cost basis applied in generating the application. The Cost Application must also include a detailed budget that is itemized

along the cost categories defined below. This detailed budget should be submitted in an unlocked Excel spreadsheet and must include the following information:

- Personnel. At minimum the budget should detail:
 - All proposed staff/positions with daily rates.
 - Total number of days in total level of effort according to key staff.
- Itemization of all other costs (e.g., agency costs, service tax, administrative costs, supplies, etc.).
- Estimated schedule of other anticipated expenses (travel, subawardee resources, supplies, outside resources, etc.).
- Details of all subcontracted work, this includes proposed consultants as well as proposed subawardees.

The Cost Application shall begin with a summary budget detailing costs in the following categories:

Description	Total Cost (USD)
Personnel	
Fringe Benefits	
Travel	
Equipment	
Supplies	
Other Direct Costs	
Contractual	
Consultants	
Total Direct Costs	
Indirect Costs	
Total Project Costs	

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 that are related to overall general operations and

are shared among projects and/or functions. Examples include executive oversight, existing facilities costs, accounting, grants management, legal expenses, utilities, and technology support.

If your organization includes indirect costs in the budget, you must provide a Negotiated Indirect Cost Rate Agreement with the US Government or three years of audited financials to PATH to validate the use of this rate.

VI. Application Requirements – Technical

Provide a narrative on your technical approach to accomplish the Scope of Work identified in section IV, including:

- Description of technical approach which includes:
 - Problem statement and solution approach.
 - A description of how your solution will accomplish each of the subtasks in this application.
 - Potential obstacles and plans to overcome them.
 - Identification of key outputs, deliverables, and measures to support the success and undertaking of the activities and approach.
- Timeline to meet the deliverables.
- Identification of major internal and external resources.
- Profile of relevant experience and examples of related work.
- Staffing plan accompanied by Curriculum Vitae (CV) for key technical positions.
- 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.

VII. Additional Attachments

1. Illustrative Work Plan. An illustrative first year work plan timeline should be included in the Annex. This work plan should include illustrative results and describe specific interventions to achieve those results. The illustrative work plan should describe specific interventions (activities) planned for the relevant tasks and should include a timeline providing target dates for achievement of milestones and illustrative results.
2. CVs for all proposed Key Personnel. A complete and current CV must be submitted for each key personnel position, detailing the requisite qualifications and experience of the individual.
3. Staffing Plan. Offerors shall include a staffing plan, including specific position titles and the approximate level of participation for each position (percentage of Full Time Equivalent and time period).
4. Third Tier-Subawardee Agreements, Contracts or Commitment. Offerors may submit any agreements, contracts or commitments it has with any potential third tier- subawardee.
5. Past Performance Information Sheets.

VIII. Application Evaluation Criteria

The following is a list of significant criteria against which applications will be assessed.

1. Technical Approach that conforms to all of the components listed in Section VI above **(40 points)**
 - Description of technical approach.
 - Timeline to meet the deliverables.
 - Identification of major internal and external resources.
 - Qualifications
 - Profile of relevant experience and examples of related work.
 - Staffing plan accompanied by CVs for key technical positions.
 - Number of years in business.
2. Experience - to be validated by past performance references **(15 points)**.
3. Experience with terminology and metadata management and standards - to be validated by past performance references **(15 points)**.
4. Costs - as detailed in Section V **(30 points)**.

Note: PATH reserves the right to include additional criteria.

IX. Instructions and Deadlines for Responding

A. PATH contacts

Program Contact: Caitlin Bowman; cbowman@path.org

Procurement Contact: Teresa Gingras; tgingras@path.org

Technical Lead Contact: Jenny Thompson; jthompson@path.org

B. Applications Due: **May 27, 2020**

Completed applications should be submitted by email to the contacts listed above. The subject line of the email should read: "RFA # 2020-027 - Open Concept Lab Metadata Registry"

We advise that you send files in commonly recognized MS formats. We will not accept responsibility for resolving technical transmission problems with applications.

C. Fact-finding Questions

Questions on this solicitation will be accepted via email to the contacts listed above through May 15, 2020 by 5pm EDT. Responses to all submitted fact-finding questions will be posted to [Digital Square's website](#) on May 18, 2020. Please note that responses will not be confidential except in cases where proprietary information is involved. Inquiries after this date cannot be accommodated.

D. Conclusion of Process

Applicants will be notified of the decision by June 5, 2020. 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.

X. 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 application. The applications submitted through this RFA process are the responsibility of the submitter and do not necessarily reflect the views of the United States Agency for International Development (USAID), the United States Government, or PATH.

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. Applications, 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 RFA, 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 IX. 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 application.

E. Acceptance

Acceptance of an application 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' applications, as well as the option of accepting partial components of an application 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. Application Validity

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