

# Request for Application #2020-019

## Notice E1: Client Registries

### 1. 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	April 20, 2020
Submission of fact-finding questions to <a href="mailto:cbowman@path.org">cbowman@path.org</a>	April 24, 2020 by 5pm EDT
All fact-finding questions and answers posted to <a href="#">Digital Square's website</a>	April 29, 2020
Preliminary concept note due	May 8, 2020 by 5pm EDT
Final concept note due	May 22, 2020 by 5pm EDT
Notification of in-scope concepts	June 5, 2020
Preliminary technical application iteration for co-creation due	June 19, 2020 by 5pm EDT
Preliminary technical application for comment due	July 3, 2020 by 5pm EDT
Full applications due	July 24, 2020 by 5pm EDT
Applicants notified of decision	September 2020

### 2. 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](http://www.path.org).

### 3. 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.

With regards to global goods, Digital Square focuses on the following activities.

1. Securing investment to increase the resilience, reuse, and sustainability of digital health global goods, which will ultimately reduce the cost of individual digital deployments while also increasing the effectiveness and impact of those deployments.
2. Development of, and advocacy for, the adoption of common metrics to compare and prioritize future investments in global goods.
3. The establishment of efficient governance processes and financial mechanisms, building trust in, and additional resources for, global goods.

We are also working with partners to create digital market readiness by building capacity with governments, local technology developers, and health workers to bring these technologies to scale. This request for application (RFA) is published with activity 1, above, in mind.

#### B. Open Application Process

Submission of applications will utilize the Digital Square [Open Application Process](#) (OAP), which begins with a concept note. Application submission deadlines are detailed below and application materials must be submitted on Digital Square's [open application platform](#). By submitting your application to Digital Square, applicants acknowledge and agree that your application, including overall budget amount will be shared publicly on [open application platform](#). This process and platform promotes transparency with other applicants, Digital Square's [Peer Review Committee \(PRC\)](#), and other organizations and individuals without obligation of confidentiality. By participating in the OAP you agree that detailed budget breakdowns may be shared with the Digital Square [Governing Board Investment Review Committee \(IRC\)](#).

PATH requests that applicants provide a Concept Note (details under section 4. Concept Note) after which determinations will be made based on the evaluation criteria to showcase which concepts are “in-scope.” At that juncture, in-scope applicants will be invited to submit Full Applications (details under section 5. Full Application Requirements - Technical). The Full Application also requires financial details (please see 6. Full Application Requirements - Cost for further information).

### C. Proposed Project Timeline

PATH anticipates that subawards will begin upon signature and end by June 30, 2021. In addition to project specific deliverables based on individual scopes of work, PATH will require applicants to provide quarterly narrative and financial reports, at minimum, to support their work.

#### A. Application Review Membership

Navigate to the [Peer Review Committee \(PRC\)](#) and [Investment Review Committee \(IRC\)](#) to review current membership.

#### B. Conclusion of Process

Applicants will be notified of the decision in September 2020. 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. 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.

#### C. Digital Square Resources

[Grant & contract basics](#) provides an overview of legally binding agreements. For more information following the procurement process for selected applicants, review [global good investment process](#).

## 4. Concept Note

### A. Scope of Work

Under Notice E1, Digital Square is accepting applications for investments in support of a fully functional, open-source and standards-compliant client registry that supports "Registration as a Service" and is designed to support longitudinal management of patient data in low resource contexts. Applications must align their solutions to be part of the Instant OpenHIE project and initiative to ensure harmonization and leveraging of work undertaken in that project.

The [OpenHIE Architecture Specification](#) frames a Client Registry as a solution to allow for accurate and efficient unique identification of patients. This is an essential function for a fully realized digital health architecture. A client registry (CR) is designed to support patient identity management and enables identities from disparate point-of-service applications to be linked to a unique Health Enterprise (HE) identity for each patient.

Proposed solution should address and encompass the following technical and engagement scope:

***Functional and Interoperable requirements:*** the proposed solution should be compliant to all existing *interoperable* specifications as laid out in the OpenHIE Specification in relation to a client registry and allow it to operate within a health information exchange (HIE) environment as a client registry. The proposed *functional requirements* should meet all stated requirements of the OpenHIE Specification for a client registry. In addition, the solution should account for engaging with stakeholders and the OpenHIE Client Registry community to refine functional specifications and additional required functionality as well as aligning the interoperability functionality to meet the relevant Fast Healthcare Interoperability Resources (FHIR) profiles.

Proposed solution may leverage existing works, software, tools, or products that provide the functionality of a client registry. The proposed solution's technical designs should:

- show consideration for the development of the solution for scale and use at country level in low resource settings;
- make use of best practices to allow the solution to be used in low resource settings.

- Meet the functionality outlined in the OpenHIE Specification and cater to industry expected functionality for an MPI.

Key features expected in the solution include:

- the ability to set matching algorithms and have bulk matching options;
- logging and full audit trails of all changes to both configurations as well as entities within the tool by users;
- have a functioning UI for administration of the system;
- have the ability to bulk import and export patients;
- have ability to merge and split patients as required.

The applicant is expected to describe the key functionalities of the proposed solution. Applicants are expected to draw on their experiences to identify the depth of requirements and provide clear indication of these in the final submitted application.

**Installation and Deployment:** the proposed solution should not only follow international conventions to support industry and enterprise installation and deployment patterns, but also **should** support the [Instant OpenHIE](#) deployment and configuration requirements to form part of the large infrastructure. This is inclusive of harmonized containerization approaches with the project, as well as scripted configurations and data sets (as required) to showcase the functionality of base use cases. The proposed solution should ensure alignment to emerging guidelines such as the [DevOps and Cloud-Services](#) guidelines.

In addition, the solution should be built to support the [installation quality](#) aspects of implementation and ensure that functionality and documentation exist that allow implementers to validate that the initial installation of the tool is as per expected. Functionalities and artifacts could include documented “expected” state of successful installation, installation reports validating all services are operational, and initial system check tests to support successful and correct installation.

**Quality Assurance and Testing:** the application should provide activities that encompass strong and empirical evidence of well thought out quality assurance patterns to validate functionality and provide a sustained and consistent base of evidence that the software both meets the functional requirements or feature sets but also is built as expected. The solution should strive towards having a documented testing strategy that outlining any major risk areas/business critical functions and strategies of testing to mitigate failure in these areas. This testing strategy should be operationalized in a testing framework that is applied against the tool in a repeatable manner and the QA plans and reports as well as available indicators outlining the level and coverage of testing should be available for review. At a minimum the solution is expected to work with the OpenHIE DevOps community and contribute and develop test in line with the conformance and testing framework of OpenHIE to showcase that the solution meets the interoperability and functional requirements (these tests are to be contributed to back to the OpenHIE community too).

**Product Information and Documentation:** The solution should include the development of product information and documentation artifacts and cater to the required audiences.

Key areas of documentation are:

**Product information:** an outline in a summary form the key functions and value proposition of the tool and serve as a “quick access” document for decision makers to understand the value proposition and value gained from the tool (e.g., a brochure).

**Product Documentation:** is inclusive of all aspects to support an effective and safe implementation and ongoing operations of the tool in the field. Documentation is inclusive of, but not limited to:

- Developer documentation (software design, patterns, etc.)

- Implementer documentation (installation guides, architectural implementation patterns for scale, implementation validation checks, etc.)
- Administrator guides (configuration option and descriptions of all features and options, etc.)
- User guides and operation manuals (outlining the functionality of the system as well as how it operates).

Examples of investments that will be made available through this call for Applications include (but are not limited to):

- the development of new, or extension of existing solutions to meet the requirements laid out;
- engagement within the OpenHIE Client Registry community to refine the requirements and specifications that will drive the feature development that will be in the tool;
- development and identification of tests to validate the interoperability workflows as per the OpenHIE Specification;
- development of appropriate documentation to support the tool in use.

## B. Required Elements

In the first phase of the [Open Application Process \(OAP\)](#), applicants will submit concept notes to the [open application platform](#). Concept notes should be **three pages or less** in length. To be eligible for funding through Notice E1, applicants must complete the [concept note template](#), which includes:

### I. *Two Sentence Overview*

In two sentences, provide a description of your project for a nontechnical audience. Please describe: the goal(s) of the project; how the goal(s) will be achieved; how your organization's expertise will contribute to achieving the project goal(s).

### II. *Executive Summary*

Describe in two to three paragraphs, for a nontechnical audience, the context under which this application or work plan is being submitted to Digital Square and the expected outcomes. Answer the following questions: What will this investment from Digital Square specifically go toward? What is/are the goal(s) of the project? How will the goal(s) be achieved? How will your organization's expertise contribute to achieving the project goal(s)?

### III. *Consortium Team*

If you are looking for partners or collaborating organizations, indicate the type of support needed and put the text in **bold font** so that it stands out.

Describe in two to three paragraphs the composition of the consortium: In the first paragraph of this section, describe the prime organization, including the skill sets of the organization relative to the project. Include how the organization will lead/manage the work. In the second paragraph, identify supporting organizations. Include technical capabilities aligned with the application activities for each organization. Include the following details: Profile of organization's relevant qualifications, and how capabilities will augment the prime organization.

### IV. *Project Description*

Describe the project idea in further detail. If you have phases or objective areas in your project, outline those in the project description. Subsections within the project description should include:

#### i. *Background or problem statement*

Put the project/work within the larger context. Detail relevant background information necessary for a third party to understand. Where is the work taking place? What is the current phase/stage of project? Is this an ongoing or discrete project?

- ii. Objectives  
What is the technical approach or anticipated activities to address the problem statement and anticipated outcomes? Provide a short description of monitoring and evaluation approach, techniques, and/or process.
- iii. Deliverables & Schedule  
What are the outputs or deliverables? What is the anticipated timeline to meet deliverables?
- iv. Risk Mitigation  
Are there potential obstacles or risks? What is the mitigation strategy and/or plan to overcome them?

**Applicants must submit preliminary concept note in the first two weeks of the concept note phase.** The first version of a preliminary concept note submitted after the due date will not be reviewed to move onto the application phase and therefore is ineligible for funding.

When submitting the concept note to the [open application platform](#), you should copy sections I-III into the platform and list the consortium team organization(s), as applicable. The [open application platform](#) will also ask you to provide digital health atlas registration confirmation (required), tagging, geographic reach, and source code, as applicable.

Digital Square requires that the global good is registered as a software in the [Digital Health Atlas](#) (DHA). This ensures that users of the DHA can reference it in future project registrations. If the digital health tool is registered, please include a screenshot of the entry under “Attachments.” If it is currently not part of the taxonomy to register the software, please register by contacting Maeghan Orton at [maeghan.ray@gmail.com](mailto:maeghan.ray@gmail.com) and include a copy of this email under “Attachments” in [open application platform](#). Please see *Appendix A: Application Requirements – Technical Checklist*.

Concept notes that are aligned with Digital Square’s vision, priorities, and funding objectives will be invited to submit a full application. Currently, US\$600,000 of funding has been identified from which one subaward is expected to be made.

## 5. Full Application Requirements - Technical

The technical application should be written clearly and define all work, deliverables, and timelines of performance to eliminate ambiguity. Any acronyms used should be spelled out and technical jargon should be minimized in favor of commonly understood terms. Please see *Appendix A: Application Requirements – Technical Checklist*.

Following the concept note stage, notified applicants, using feedback received in the concept note phase, will begin preliminary application development in the [technical application template](#).

**The preliminary application should contain only the [technical application template](#).** During the application finalization step, following the application co-creation and comment period, the full application package must include a detailed budget and budget narrative (see 6. Full Application Requirements - Cost for more information).

During the preliminary application co-creation step applicants, and other stakeholders can provide feedback, comments, and suggestions beginning the day of application posting. **Applicants must post a technical application iteration within the first two weeks of the preliminary application co-creation step.** The first version of a preliminary technical application submitted after the due date will not be reviewed to advance to the full application phase and therefore is ineligible for funding.

Applicants may continue to post technical application iterations on the forum until the preliminary application comment period begins. Please indicate updates by saving the file with a version number at the end of the file name or date (e.g., “ApplicationTitle\_v1”). As necessary, please revise the two-sentence overview, executive summary, and consortium team on the [open application platform](#) page.

## Required Elements

To be eligible for funding through Notice E1, applicants must expand their concept notes to include the following additional subsections in the [technical application template](#):

- *High-level Budget Summary*  
During the application finalization step, include the total requested value. If the technical application includes multiple work packages, please include the value of each work package.
- *Digital Health Technologies*  
Provide an overview of key digital health tools, technologies, and standards that the project will be utilizing or investing, as well as the interactions between them. Detailed information (e.g., architecture or sequence diagrams) and linkages to existing Digital Square investments may be provided as supporting documents.
- *Use Cases and User Stories*  
Summarize key use cases and user stories that will be addressed by this intervention.
- *Objectives and Activities*  
Detail all objectives so that even someone unfamiliar with the project can understand what is expected of all parties involved. Define the activities of the project/assigned work (i.e., things that will be knowable and measurable at subaward end) and activities undertaken to meet the objectives. If your application includes several objective areas or workstreams, the application should be broken up into clearly identified **work packages**. Any dependencies between work packages should be clearly indicated.
- *Community Feedback*  
Describe how the consortium proposes to engage with the broader digital health community for feedback and input. Indicate the expected frequency of such engagements, as well as the type of expected input (e.g., feedback on architecture/design, use case alignment). Applications should include how the consortium will engage with the OpenHIE community as well as engagement with country stakeholders to solicit input on prioritizing requirements.
- *Schedule*  
Using the Objectives and Activities outline above, estimate month(s)/quarter(s) for the task(s) and list the entity responsible if a consortium member will support the task. Indicate month/quarter for designated activities with no end product (meetings, phone calls).
- *Deliverables*  
Detail the expected deliverables in a tabular format that includes the name and a description of the expected output. A deliverable is a specific output (i.e., activity or item) the applicant will produce over the term of the subaward. Deliverables may be programmatic (e.g., reports, screenshots, code, certifications) or financial (e.g., invoices or financial reports). Deliverables document progress toward completion of the objectives detailed in the subaward scope of work.
- [Global Good Maturity Model Assessment](#)  
Complete the self-assessment and include a [link](#) to the Google Sheet. You do not have to reach a certain threshold on the Maturity Model to qualify for funding through the Notice.

## 6. Full Application Requirements - Cost

Digital Square is only requesting detailed financial information during the application finalization step following the preliminary application comment period. The budget should clearly outline the costs of the proposed project. If your application includes work packages (*See 5: Objectives & Activities*) the cost application must be broken down by the work packages. All costs must be submitted in United States dollars (USD). Please see *Appendix B: Full Application Requirements – Cost Checklist*.

In the application finalization phase, please bear in mind that the technical application and cost application are complementary documents. The programmatic relevance of elements of cost such as level of effort (LOE), equipment, travel, and subawards or consultants, which should include consortium members, must be demonstrated by the scope of work (SOW).

### Required Elements

To be eligible for funding through Notice E1, applicants must complete a cost application consisting of a detailed budget and budget narrative in the provided templates. A cost application includes:

1. [Detailed budget](#) for the total period of performance, submitted in an unlocked Excel file and includes the following information:
  - a. Personnel. At minimum the budget should detail:
    - i. All proposed staff/positions with rates.
    - ii. Total number of days in total level of effort according to key staff.
  - b. Itemization of all other costs (e.g., agency costs, service tax, administrative costs, supplies, etc.).
  - c. Estimated schedule of other anticipated expenses (travel, supplies, etc.).
  - d. Details of all subawarded work, including proposed consultants, proposed subawardees, and consortium members, as applicable.
2. [Budget narrative](#) detailing the cost and cost basis applied in generating the application. The budget narrative shall explain in a detailed but concise manner the assumptions made in order to arrive at each cost. The budget narrative will also provide the contact information (name and email) for the technical point of contact.

The cost application shall begin with a summary budget detailing costs. All budgets should be organized based on types of costs as set forth in the section immediately below *along with a technical point of contact for each related work package*.

Description	Work Package 1, as applicable (USD)	Work Package 2, as applicable (USD)	Total Cost (USD)
<b>Technical Point of Contact</b>	<b>Name, Email</b>	<b>Name, Email</b>	
Personnel (Salaries & Wages)			
Fringe Benefits			
Travel			



Equipment			
Supplies			
Other Direct Costs			
Contractual			
Consultants			
<b>Total Direct Costs</b>			
Indirect Costs			
<b>Total Project Costs</b>			

All mathematical calculations must be presented clearly in the budget spreadsheet. Note that although the template is designed for a two-year grant, your project may be shorter. You should modify your budget depending on your proposed start and end dates. The spreadsheet also contains broad cost categories and some of them may not be applicable to all organizations projects. Only fill out those categories that apply to your specific proposed project.

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 LOE 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 applicant's technical quote.

**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, and your application is selected, your organization 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.



## 7. Additional Attachments, *optional*

- A. Resumes and Letters of Commitment may be submitted for proposed Key Personnel. A complete and current resume may be submitted for each key personnel position, detailing the requisite qualifications and experience of the individual. Qualifications, experience and skills shall be placed in chronological order starting with most recent information.
- B. Third tier Subawardee Agreements, Contracts or Commitment. Offerors may submit any agreements, contracts or commitments it has with any potential third tier- subawardee.
- C. Past Performance Information Sheets.
- D. Awards. Applicants may include any information on awards or certifications.

## 8. Application Evaluation Criteria

The following is a list of significant criteria against which Applications will be assessed by the [Peer Review Committee \(PRC\)](#) and [Investment Review Committee \(IRC\)](#). These criteria are part of the [Prioritization Framework](#), which was developed by Boston Consulting Group, in consultation with Digital Square and other stakeholders. A full application adheres to the technical application scope of work requirements and cost application requirements, and will be evaluated based on the following:

Dimension	Considerations
<p style="text-align: center;"><b>Impact</b></p> 	<p><b>Demonstrated need:</b> Does the application appropriately address a significant country need or gap in the technology ecosystem as evidenced by use of, approval of, and/or interest in the technology?</p>
	<p><b>Applicability:</b> Does the application support a reusable digital health asset that could potentially be deployed in a variety of contexts over time?</p>
	<p><b>Adoptability:</b> Does the application have a robust plan to drive adoption/scale (e.g., terms of documentation, interoperability, being appropriately open sourced)?</p>
	<p><b>Potential for health impact:</b> What is the potential impact of the project on health systems and ultimately health outcomes?</p>
<p style="text-align: center;"><b>Cost</b></p> 	<p><b>Investment appropriateness:</b> Is the investment requested reasonable given the application’s goals?</p>
	<p><b>Reasonable total cost of ownership:</b> Is the total cost of ownership reasonable given target users?</p>

	<b>Funder alignment:</b> Is Digital Square the appropriate funder for this application versus other funders?
<b>Technology</b> 	<b>Relationship with existing ecosystem:</b> Does the application appropriately work with or leverage existing technology?
	<b>Differential value:</b> Does the application provide unique value versus analogous projects or technologies?
	<b>Sound technical strategy:</b> Does the application articulate a compelling technical strategy based on appropriate technical documentation?
<b>Probability of Success</b> 	<b>Overall approach:</b> Is the application well-thought-out, and does it adhere to the <a href="#">Principles of Digital Development</a> ?
	<b>Application plan:</b> Are activities clearly articulated with owners and measurable indicators of success?
	<b>Partners:</b> Does the application involve collaboration between an appropriate set of partners (i.e., technical experts, users, donors, etc.)?
	<b>Team:</b> Does the application team have the skill sets to deliver on the work?
	<b>Financial sustainability:</b> Does the technology have other existing or anticipated funding streams, or at minimum, a reasonable business plan for future sustainability?

Note: PATH reserves the right to include additional criteria.

## 9. Application Submission Process and Timeframes

### A. PATH contacts

Program Contact: Caitlin Bowman, [cbowman@path.org](mailto:cbowman@path.org)

Procurement Contact: Teresa Gingras; [tgingras@path.org](mailto:tgingras@path.org)

Technical Lead Contact: Carl Leitner; [cleitner@path.org](mailto:cleitner@path.org)

### B. Timeframe

As described in 3 A b: Open Application Process, submission of Applications will utilize the Digital Square Open Application Process, which begins with a concept note. Application submission deadlines are detailed below and Application materials must be submitted on Digital Square's [open application platform](#).

Step #: Summary	Description	Approximate Timeline
<b><i>Concept Note Phase</i></b>		
Step 1: Concept note development	<p>Digital Square issues a call for applications, and applicants upload concept notes to Digital Square's public-facing <a href="#">open application platform</a>. In the first few weeks, as outlined by the solicitation, applicants will submit concept notes.</p> <p>Applicants must use the <a href="#">concept note template</a>.</p>	<p>3 weeks April 20-May 8</p>
Step 2: Concept note review	<p>In the few weeks following the concept note submission deadline, other applicants and/or other stakeholders in the community may provide feedback, comments, and suggestions, as well as identify potential areas for collaboration.</p>	<p>2 weeks May 11-May 22</p>
Step 3: Digital Square review of concept notes	<p>Following the concept note review, Digital Square assesses concept notes to ensure alignment with the initiative vision and funding objectives identified in the Notice. Digital Square eliminates concept notes that are not strategically aligned with the above.</p> <p>Digital Square identifies a set of short-listed concept notes based on the Notice criteria and emails applicants who are eligible to advance to the application phase.</p>	<p>2 weeks May 25-June 5</p>
<b><i>Application Phase</i></b>		

<p>Step 4: Preliminary technical application co-creation</p>	<p>Using feedback received in the Concept Note Phase, applicants will begin preliminary application development.</p> <p>Applicants must use the <a href="#">technical application template</a> and post an application iteration on the <a href="#">open application platform</a> in the first 2 weeks.</p> <p>At the conclusion of this step, Digital Square will close the ability to upload new content to <a href="#">open application platform</a>.</p>	<p>2 weeks June 8-June 19</p>
<p>Step 5: Preliminary technical application comment period</p>	<p>During this time, other applicants and other stakeholders in the community should provide feedback, comments, and suggestions.</p>	<p>2 weeks June 22-July 3</p>
<p>Step 6: Application finalization</p>	<p>Using feedback during the preliminary technical application comment period, applicants revise the technical application, develop a budget and budget narrative, and submit these to the Digital Square <a href="#">open application platform</a>. Applicants must use the provided <a href="#">technical application</a>, <a href="#">budget</a>, and <a href="#">budget narrative templates</a>.</p> <p>The budget and budget narrative are not shared publicly on the platform. Commenters see only the high-level summary budget provided in the <a href="#">technical application</a>.</p>	<p>3 weeks July 6-July 24</p>
<p><b><i>Review and Investment Phase</i></b></p>		

<p>Step 7: Peer Review Committee (PRC) review</p>	<p>Digital Square groups applications for <a href="#">PRC</a> scoring and technical feedback. Three <a href="#">PRC</a> members will review each application.</p> <p>The <a href="#">PRC</a> reviews applications according to the <a href="#">Prioritization Framework</a>, notice scope of work technical requirements and evaluates applications as green-, amber-, or red-lit per the <a href="#">PRC Membership Policy</a>. Green-lit applications are recommended for funding immediately; amber-lit applications are recommended for future funding or further exploration; red-lit applications do not fully meet the selection standards/criteria.</p> <p>The <a href="#">PRC</a> sees only the high-level summary budget. Proprietary information including salaries, indirect rates, or other factors are not shared with anyone outside of the funder and Digital Square.</p>	<p>3 weeks July 27-August 14</p>
<p>Step 8: Digital Square recommendation</p>	<p>Digital Square compiles the evaluation provided by the <a href="#">PRC</a> by clustering the applications according to the <a href="#">Prioritization Framework</a> for <a href="#">Governing Board Investment Review Committee (IRC)</a> review.</p> <p>Digital Square creates an investment package recommendation of the highly scored applications for the <a href="#">Governing Board Investment Review Committee</a> based on the funding round objectives, donor priorities, and Digital Square vision.</p>	<p>2 weeks August 17-28</p>
<p>Step 9: Investment Review Committee (IRC) review</p>	<p>Digital Square presents the applications, high-level budget summary, <a href="#">PRC</a> feedback within the <a href="#">Prioritization Framework</a>, and Digital Square recommendation to the <a href="#">IRC</a></p> <p>The <a href="#">IRC</a> evaluates whether to approve the investment packages and reserves the right to modify the recommendation at their discretion.</p>	<p>Per schedule</p>


Step 10: Award Phase	<p>Digital Square shares the investment decisions approved by the <a href="#">IRC</a> with applicants. Upon applicant request, <a href="#">PRC</a> feedback shall be shared with applicant.</p> <p>Digital Square notifies the <a href="#">Governing Board</a> of the IRC evaluation and investment decision. This step will occur during routine <a href="#">Governing Board</a> communications.</p> <p>Investment decisions are contingent on funder approval.</p>	September 2020
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### C. Fact-finding Questions

Questions on this solicitation will be accepted via email to the contacts listed above through April 24, 2020 by 5pm EDT. Responses to all submitted fact-finding questions will be posted to Digital Square's website on April 29, 2020. Please note that responses will not be confidential except in cases where proprietary information is involved. Inquiries after this date cannot be accommodated.

## 10. Terms and Conditions of the Solicitation

### A. Notice of non-binding solicitation

PATH reserves the right to reject any and all applications 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

Applicants submitting 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 9. 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.



## Appendix A: Application Requirements – Technical Checklist

- To be eligible for funding through Notice E1, all application materials must be submitted on Digital Square's [open application platform](#)
- Applications must align their solutions to be part of the Instant OpenHIE project and initiative to ensure harmonization and leveraging of work undertaken in that project.

### Concept Note Phase

- Applicants must upload their concept note within the first two weeks of solicitation release
- Applicants must provide digital health atlas registration confirmation (required), tagging, geographic reach, and source code, as applicable
- Applicants must complete the [concept note template](#) which includes
  - Two-Sentence Overview
  - Executive Summary
  - Consortium Team
  - Project Description including background or problem statement, objectives, deliverables & schedule and risk mitigation.

### Application Phase

- Applicants must post a technical application iteration within the first two weeks of the preliminary application co-creation step.
- Applicants **must** complete the [technical application template](#), which includes:
  - Two-Sentence Overview
  - High-Level Budget Summary
  - Executive Summary
  - Consortium Team
  - Background or Problem
  - Digital Health Technologies
  - Use Cases and User Stories
  - Objectives and Activities
  - Community Feedback
  - Schedule
  - Deliverables
  - [Global Good Maturity Model Assessment](#)

## Appendix B: Full Application Requirements – Cost Checklist

- To be eligible for funding through Notice E1, all application materials must be submitted on Digital Square's [open application platform](#)
- If your application includes work packages (see Section 5: Objectives and Activities), the cost application must be broken down by work package.
- All costs **must** be submitted in United States dollars (USD).
- The programmatic relevance of elements of cost such as level of effort, equipment, travel, and subawards or consultants **must** be demonstrated by the scope of work.
- All mathematical calculations **must** be presented clearly in the budget spreadsheet, provided in the worksheet.
- The [budget narrative](#) **must** explain and justify all of the expenses required to achieve the project aims and objectives described in the [technical application](#).
- Applicants **must** complete a cost application consisting of a [detailed budget](#) and [budget narrative](#) in the provided templates. A cost application includes:
  - [Detailed budget](#) for the total period of performance, submitted in an unlocked Excel file, which includes the following information:
    - a. Personnel. At minimum, the budget should detail:
      - i. All proposed staff/positions with rates.
      - ii. Total number of days in total level of effort according to key staff.
    - b. Itemization of all other costs (e.g., agency costs, service tax, administrative costs, supplies, etc.).
    - c. Estimated schedule of other anticipated expenses (travel, supplies, etc.).
    - d. Details of all subawarded work, including proposed consultants, proposed subawardees, and consortium members, as applicable
  - [Budget narrative](#) detailing the cost and cost basis applied in generating the application. The budget narrative shall explain in a detailed but concise manner the assumptions made in order to arrive at each cost. The budget narrative will also provide the contact information (name and email) for the technical point of contact.