

# Request for Application #2020-040

## Data for Accountability, Transparency and Impact Monitoring (DATIM) External Systems Support

### 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 (RFA)	July 13, 2020
Submission of fact-finding questions to <a href="mailto:cbowman@path.org">cbowman@path.org</a>	July 17, 2020 at 5pm EDT
All fact-finding questions and answers posted to <a href="#">Digital Square's website</a>	July 20, 2020
<b>Applications due</b>	<b>July 31, 2020 at 5pm EDT</b>
Applicants notified of decision	August 14, 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](http://www.path.org).

### III. Project Background

#### A. Project Background

Digital Square is a partnership of the world's leading digital health experts 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 the Data for Accountability, Transparency and Impact Monitoring (DATIM) initiative. Through this RFA, PATH seeks partnership with subrecipient(s) that can support communities of practice and digital health tools to improve the quality, timeliness and usability of data for President's Emergency Plan for AIDS Relief (PEPFAR) programmatic needs by supporting linkages between DATIM and systems external to PEPFAR.

#### B. Proposed Project Timeline

PATH anticipates that the implementation period for phase 1 will be for approximately nine months with possible extension contingent upon availability of funds and/or satisfactory performance. Applicants must provide an estimate for phase 2 to create an annual estimate.

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. For more information about the project lifecycle for the selected applicant(s), please review Digital Square's [investment process](#).

### IV. Scope of Work and Deliverables

#### A. Scope of Work

[DATIM](#) is the PEPFAR data collection platform designed to target PEPFAR resources more effectively in order to streamline, standardize, and integrate program data for better analysis and decision making.

DATIM will assist in achieving and sustaining HIV/AIDS epidemic control by:

- Evaluating site-level targets and results.
- Providing epi and geospatial data overlays for volume, yield, and performance analysis.
- Integrating new and emerging data streams to analyze implementing programs' accountability, transparency, impact, and quality.
- Providing tighter feedback loops for course correction and continuous analysis.

The scope of work in this RFA is to provide support to DATIM across three objectives. An applicant may choose to submit an application for one or more of these objectives. Each objective contains multiple workstreams and an applicant must apply for all of the workstreams within an objective.

Applicants must provide a concept note with an estimated timeline and high-level budget to implement Phase 2 described in this RFA beyond the funding outlined by objective in section V. The work to be completed is grouped into the following objectives and workstreams:

- **Objective A (Interoperability Layer Support)** Under this objective, an applicant would lead the ongoing maintenance and communities of practice for an Interoperability Layer (IOL) in support of [DATIM](#) implementation needs. Areas of focus should include support for routine aggregate reporting as well as support for aggregation and transformation of data from patient level systems within a Shared Health Record (SHR). Applicants should structure the work under this objective in such a manner that there is a consistent total level of support per month across the workstreams outlined below, with DATIM-specific needs prioritized but allowing for broader community engagement and support.
  - **Workstream 0 (DATIM Support):** In this workstream, the applicant will support technical development needs of the open source health information mediator ([OpenHIM](#)), a reference implementation of the IOL, as determined by the use cases for the DATIM project. The applicant would also be expected to engage in knowledge transfer activities on the use of OpenHIM to the broader DATIM community. Use cases will be defined iteratively during the course of the project, and support for this workstream should take precedence over other workstreams within this objective.
  - **Workstream 1 (Technical Leadership and Community Management):** In this workstream the applicant will contribute to OpenHIE specification and architecture resources within the scope outlined in the objective, chair the IOL community within OpenHIE, and engage with appropriate [OpenHIE](#) communities by contributing to community processes and documentation in which the IOL and SHR are implicated.
  - **Workstream 2 (Productization and Global Help Desk):** In this workstream, the applicant would support productization of OpenHIM through activities such as ensuring that there is sufficient documentation, product information and that the tool supports OpenHIE specification updates and the emerging adoption of health level seven international fast healthcare interoperability resources ([HL7 FHIR](#)). In addition, the applicant would be expected to support general queries and requests for information around the tool from the broader health community and provide a global help desk for the technology. Activities should be undertaken in this workstream only after satisfying the needs of the other two workstreams.
- **Objective B (OpenHIE Community Support):** In this workstream, applicants will provide core community support to OpenHIE through secretariat support, executive leadership and leadership of the Data Use Community. Applicants should structure the work under this objective in such a manner that there is a consistent total level of support per month across the workstreams outlined below, with DATIM-specific needs prioritized but allowing for broader community engagement and support.
  - **Workstream 0 (OpenHIE Secretariat Support):** The applicant will provide support of the OpenHIE initiative the team through leadership roles in within the community, provide architecture review board leadership, support the planning of the OpenHIE community meetings, provide secretariat support, and develop materials to help countries better understand the community's goals and value proposition. In addition, the applicant will provide high level representation of aligned OpenHIE and DATIM objectives in appropriate forums.
  - **Workstream 1 (Secondary Data Use Community Support):** The applicant will support activities and a [Data Use Community](#) of practice focused on improving the collection and use of patient-level data for health care, retention, surveillance. The applicant should support developing consolidated business process documentation and methodologies that can be used to help countries develop and align on best practices for specific use cases.

- **Objective C (Terminology and Indicator Registry Services Support):** In this workstream the applicant will lead the utilization of terminology services and indicator registries for DATIM. Applicants should structure the work under this objective in such a manner that there is a consistent total level of support per month across the workstreams outlined below, with DATIM-specific needs prioritized but allowing for broader community engagement and support.
  - **Workstream 0 (PEPFAR Metadata Infrastructure Support):** In this workstream, the applicant will provide support for developing, designing and operations of the [Metadata Sharing Platform](#) (MSP) and associated tooling. The applicant should prioritize requirements arising from DATIM, particularly the MOH Alignment activities, as well as broader PEPFAR needs. Applicants should also support broader utilization and uptake of the MSP by the OpenHIE community through improved functionality and interoperability through [HL7 FHIR](#).
- **Objective D (Aligning Facility and Patient Metadata for Data Aggregation):** Under this workstream, the applicant will lead the development and support the utilization of interoperable tools and standards for the exchange of facility and patient metadata. Applicants should structure the work under this objective in such a manner that there is a consistent total level of support per month across the workstreams outlined below, with DATIM-specific needs prioritized but allowing for broader community engagement and support.
  - **Workstream 0 (Facility Data):** Under this workstream, the applicant will provide technical development of and third-tier support for the global open facility registry ([GOFR tool](#)) in support of the DATIM needs, particularly ministry of health (MOH) Alignment activities, as a first priority. The applicant should also support the needs of the broader OpenHIE community in the utilization of GOFR as a secondary priority.
  - **Workstream 1 (Standards Development):** Under this workstream, the applicant will engage with appropriate Standards Development Organizations (SDOs) such as Integrating the Health Enterprise (IHE) to develop and maintain data exchange standards which are identified as priority needs by the DATIM team. Particular areas of focus include ensuring interoperable exchange of health facility and client/beneficiary metadata.
  - **Workstream 2 (Secondary Data Use Technical Support):** Under this workstream, the applicant will provide as-needed technical support to the DATIM team in the development of tooling which supports the aggregation of patient-level data for indicator reporting to DATIM.

All source code related to project deliverables should be released under open source initiative (OSI) approved open-source licenses and will be put in appropriate source code repositories such as GitHub. Other written resources will be released under appropriate Creative Commons license or otherwise ensure are publicly accessible.

## B. Deliverables

Applicants must define illustrative results and describe specific interventions to achieve those results for the selected objective(s) and workstreams. 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.

## V. Application Requirements - Cost

The total estimated size of award for phase 1 is up to US\$930,000 from which PATH expects multiple subawards to be made. Applicants must incorporate an additional period for phase 2 to create an annual estimate at the summary level. These figures are estimates provided for informational purposes to the applicants and are not binding.

	Phase 1 estimated size of award	Phase 2 notional estimate	Annual Estimate
Objective A	\$90,000	\$30,000	\$120,000
Objective B	\$600,000	\$200,000	\$800,000
Objective C	\$150,000	\$50,000	\$200,000
Objective D	\$90,000	\$30,000	\$120,000
Total	\$930,000	\$310,000	\$1,240,000

The applicant should provide a detailed explanation of costing and describe the reasonableness of each proposed cost for phase 1 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 for phase 1 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 for phase 1 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, etc.).
- Estimated schedule of other anticipated expenses (travel, supplies, etc.).
- Details of all subcontracting out of work, this includes proposed consultants as well as proposed subawardees.

Phase 2 summary level estimates must be provided in the budget narrative by objective and workstream, but detail is not required in the excel spreadsheet.

The Cost Application shall begin with a summary budget detailing phase 1 costs by objective and respective workstream(s) in the following categories:

**ex. Objective A**

<b>Description</b>	<b>Workstream 0</b>	<b>Workstream 1</b>	<b>Workstream 2</b>	<b>Total Cost (USD)</b>
Personnel				
Fringe Benefits				
Travel				
Equipment				
Supplies				
Other Direct Costs				
Contractual				
Consultants				
<b>Total Direct Costs</b>				
Indirect Costs				
<b>Total Project Costs</b>				
<b>Phase 2 estimate</b>				
<b>Annual estimate</b>				

**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 objective(s) identified in 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
  - A description of how your solution will scale to growing needs of users across the globe.
  - Potential obstacles and plans to overcome them.
- Notional workplan for your chosen objective(s), aligned to the workstream and subtasks in this application with illustrative timeline to meet applicant defined deliverables
  - 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.
- An estimated timeline and high-level budget to implement Phase 2 described in this RFA.
- Identification of major internal and external resources.
- Past performance information sheets demonstrating:
  - Profile of relevant corporate qualifications.
  - Profile of relevant experience and examples of related work.
  - Applicants may provide any information on awards or certifications.
- Staffing plan accompanied by Curriculum Vitae (CV) for key technical positions.
  - Applicants must include a staffing plan in accordance with the Cost Application personnel requirements, including specific position titles and the approximate level of must for each position (percentage of Full Time Equivalent and time period).
  - A complete and current resume must 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 and include a list of certifications possessed by each key technical personnel.

### Annual revenue

If your company has more than one location, please indicate these qualifications for the site that is responding, including number of years in business.

## VII. Additional Attachments, optional

1. Third-tier Subawardee Agreements, Contracts or Commitment. Offerors may submit any agreements, contracts or commitments it has with any potential third tier- subawardee.

## VIII. Application Evaluation Criteria

The following is a list of significant criteria against which applications will be assessed by objective. Applicants may elect to apply to select objectives and are not required to apply to objective all for consideration.

1. Technical Approach that conforms to all of the objective 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.
  - List of certifications possessed by each key technical personnel.
  - Number of years in business.
2. Experience - to be validated by past performance references (**15 points**).
  3. Experience working with and supporting external systems interfacing with DATIM systems (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](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. Fact-finding Questions

Questions on this solicitation will be accepted via email to the contacts listed above through July 17, 2020 by 5pm EDT. Responses to all submitted fact-finding questions will be posted to [Digital Square's website](#) on July 20, 2020. Please note that responses will not be confidential except in cases where proprietary information is involved. Inquiries after this date cannot be accommodated.

### C. Applications Due: July 31, 2020 at 5pm EDT

Completed applications should be submitted by email to the contacts listed above. The subject line of the email should read: "RFA # 2020-040- (Applicant name)"

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

### D. Conclusion of Process

Applicants will be notified of the decision by August 14, 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.