

11/22/2017

# Request for Proposal # 2017-045 Global Family Planning VAN

# I. Summary and Outline of Deadlines

## A. Summary

The Reproductive Health Supplies Coalition (RHSC) wishes to contract a technology solutions partner to provide a SaaS based offering that can be configured to establish a virtual collaborative platform for family planning supply chain players to see the same data and make supply chain decisions together. This platform, otherwise known as the Global Family Planning Visibility and Analytics Network (Global FP VAN), will become the reproductive health community's global family planning supply chain control tower. This Request for Proposal (RFP) has three stages, which will be followed by the implementation of a 12-month pilot.

RFP Stage 1, or the Expression of Interest stage, will identify interested Bidders. To be eligible to participate in Stage 2 and Stage 3 of the RFP, described below, interested Bidders must send a statement acknowledging receipt of this solicitation and an expression of interest to participate no later than December 14, 2017. At this point, they become "Confirmed Interested Bidders."

RFP Stage 2, or the Collaborative Requirement Refinement stage, is optional and will provide the opportunity for Confirmed Interested Bidders to work in an online forum to provide input to the technical and functional requirements of the Global FP VAN. Confirmed Interested Bidders can participate as much, or as little, as they desire during Stage 2. It is an opportunity to help refine the requirements, to learn more deeply about the needs of the community, and to better prepare for Cost & Technical proposal submission under RFP Stage 3. The draft background documentation, process flows, sample data and functional and technical requirements will be made available in an online forum called Base Camp for all Confirmed Interested Bidders to review and comment on. The Base Camp website, log-in credentials and instructions will be made available to Confirmed Interested Bidders via email by December 15, 2017. A weekly call for open Q&A will be hosted by the Global FP VAN Core Team via a call-in platform. Call-in details will be shared via Base Camp. Notes and recordings from each call will be posted for all Confirmed Interested Bidders to review on Base Camp within 1 business day of each call. It is not required as part of Stage 2, but it is encouraged, that Confirmed Interested Bidders create a sample sandbox. Access to each sandbox will be limited to the respective Confirmed Interested Bidder, the selection committee and their task force members. Once all the input is gathered in Stage 2, the requirements will be finalized by the

Global FP VAN Core Team and presented to the Steering Committee. Once accepted, RFP Stage 3 will begin.

RFP Stage 3, or the System Selection stage, will include the release of a RFP addendum. This addendum will include the finalized background documentation, process flows, sample data and functional and technical requirements that were developed in RFP Stage 2. It will also include detailed information on the selection process and selection criteria. Confirmed Interested Bidders will have an opportunity to review the finalized documents and selection criteria and respond with an intent to continue. Confirmed Interested Bidders for RFP Stage 3 will prepare cost and technical proposals in English describing how their technology solution will address the Use Case Scenarios and finalized requirements outlined in the RFP addendum. These will be evaluated following the identified selection process and criteria, and the top respondents will be invited to provide online demonstrations and showcase their solutions in a sandbox environment.

The Successful Bidder will then partner with the RHSC and key stakeholders in the implementation of a 12-month pilot (involving 2 countries, 4 suppliers and 2-3 family planning product families) to demonstrate the capabilities and benefits of this virtual collaborative platform. It is expected that if the pilot is deemed successful, it will become a longer-term initiative where the platform and its use will be expanded to scale over time to gradually cover more countries, product families and manufacturers.

## B. Outline of Deadlines

OUTLINE OF DEADLINES		
Purpose	Deadline Items	Due Dates
<b>RFP Stage 1 - Expression of Interest (mandatory)</b>		
<ul style="list-style-type: none"> <li>Identify Confirmed Interested Bidders</li> </ul>	Release of Request for Proposal	22-Nov-17
	Expression of interest due	14-Dec-17
<b>RFP Stage 2 - Collaborative Requirement Refinement (optional)</b>		
<ul style="list-style-type: none"> <li>Weekly Q&amp;A calls with Confirmed Interested Bidders</li> <li>Engage Confirmed Interested Bidders in refining the requirements in an open and transparent manner</li> </ul>	Collaborative Requirement Refinement work in Base Camp	Dec 15, 2017 to Jan 19, 2018
	Base Camp log-in credentials and instructions shared with Confirmed Interested Bidders	15-Dec-17

	Draft background documentation, process flows, sample data and functional & technical requirements available on Base Camp	15-Dec-17
	<b>Optional Software Sandbox Draft due</b>	<b>5-Jan-18</b>
<b>RFP Stage 3 - System Selection (mandatory)</b>		
<ul style="list-style-type: none"> <li>Release an RFP addendum to Confirmed Interested Bidders, including finalized Functional and Technical Requirements and selection criteria</li> <li>Confirmed Interested Bidder submission of Cost &amp; Technical Proposal materials, including demonstrations and sandboxes</li> <li>Scoring and final system selection</li> </ul>	Release of RFP addendum, including finalized background documentation, process flows, sample data, functional and technical requirements, and selection process & criteria	29-Jan-18
	Re-expression of interest due	1-Feb-18
	Fact-finding questions received by	2-Feb-18
	Response to fact-finding questions	7-Feb-18
	<b>Cost and Technical Proposal Due</b>	<b>21-Feb-18</b>
	Software Demonstrations & Sandboxes	Feb 27-Mar 1, 2018
	Confirmed Interested Bidders notified of decision	14-Mar-18
<b>Implementation</b>		
<ul style="list-style-type: none"> <li>Twelve-month pilot in 2 countries with 4 manufacturers, focusing on 2-3 products, to determine whether the investment required to stand up a Global FP VAN is commensurate with the benefits achieved from having done so</li> <li>System configuration/interface development</li> <li>User onboarding &amp; training</li> <li>Pilot evaluation</li> </ul>	Pilot start date	April, 2018
	Kick Off event	April, 2018
	System Configuration / Interface Development	April / May, 2018
	User Onboarding / Training	April / May, 2018
	Ongoing Support and report adjustments	April to December, 2018
	Planned System Configuration and Workflow adjustments (account for new learning after data is flowing through the system)	July, 2018
	Pilot Evaluation	February/March, 2019

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

## II. RHSC Statement of Business

The RHSC is a global partnership of more than 400 public, private, and non-governmental organizations dedicated to ensuring that all people in low- and middle-income countries can choose, obtain and use affordable, high-quality supplies to ensure their better reproductive health. The Coalition brings together diverse agencies and groups with critical roles in providing contraceptives and other reproductive health supplies. These include multilateral and bilateral organizations, private foundations, governments, civil society, and private-sector representatives. Learn more at [www.rhsupplies.org](http://www.rhsupplies.org).

# III. Project Background

## A. Global Family Planning VAN

The Reproductive Health (RH) community has long recognized that limited access to a choice of safe, affordable contraceptives severely undermines efforts to increase contraceptive prevalence, both globally and at the country level. For the RHSC, a prerequisite to increased supply access must be visibility into global supply chains. Put simply, “You cannot manage what you cannot see.” Governments and global procurers need timely visibility for effective decision-making, for estimating supply needs, for taking action when product arrives, and for advocating if funding falls short. This means making access to planned orders, to shipment progress from manufacturer to country, and to country-level inventory and demand data available to a varied audience of participants in the ecosystem.

The RHSC and its members have over ten years of experience putting in place the people, processes, policies and tools to promote supply chain visibility and collaborative decision-making between governments and global procurers. The community has created two critical groups to handle the collaborative planning and exception management processes. These are the Collaborative Supply Planning (CSP) and the Coordinated Assistance for Reproductive Health Supplies (CARhs) teams. These teams function as the bridge connecting country requests and supply plans with global procurers and play a critical role in helping to balance and sequence demand needs with supply options. However, these groups are challenged with heavily manual processes, and validation and reconciliation of data from multiple systems, including the Procurement Planning & Monitoring Report (PPMR) and the Reproductive Health Interchange (RHI).

The reproductive health community has asked the RHSC to host and manage implementation of a Global FP VAN, which is intended to be a shared platform to capture and use supply chain data from multiple sources and organizations to provide enhanced visibility for decision making. This Global FP VAN will streamline access to in-country data, facilitate data harmonization and consolidate stove-piped tools to provide a single “go to” decision-making platform. It will include provisions for central governance of a collaborative network of supply chain professionals; a virtual technology platform where supply chain professionals can see the same data and execute supply decisions; agreements for global data sharing and governance; and expanded coordination of supply and demand planning processes. The

long-term vision is: (a) more timely and cost-effective delivery of commodities to countries; (b) more women reached with the right product at the right time; and (c) better coordination on how to allocate limited health resources.

# IV. Scope of Work and Deliverables

## A. Scope of Work

The RHSC seeks an established technology solutions partner to provide a SaaS-based offering that can be configured to establish the Global FP VAN. The detailed RFP selection process and criteria will be shared under RFP Stage 3, but one definite criteria is a proven track record in increasing supply chain visibility at the global level by the start of implementation. In addition, key attributes of the SaaS-based offering that will be assessed during the selection process include an ongoing delivery & support model; potential for near seamless upgrades; the capacity for enhancements to be folded into next upgrades without the need to re-develop per client; a customer support model; and a focus on configuration over development.

The successful Bidder will partner with the RHSC and key stakeholders in the implementation of a 12-month pilot (2 countries, 4 suppliers and 2-3 family planning product families) to demonstrate the capabilities and benefits of this virtual collaborative platform. The implementation team will also develop the necessary documentation for the standard operating procedures for each role, including the steps necessary for onboarding additional users, products and countries. The results of this effort will determine whether the investment required to stand-up a Global FP VAN is commensurate with the benefits of doing so. It is expected that if the pilot is deemed successful, it will become a longer-term initiative where the platform and its use will be expanded to scale over time to gradually cover more countries, products and manufacturers.

## B. Proposed Timeline

This Request for Proposal (RFP) has three stages, followed by 12 months of pilot implementation.

RFP Stage 1, or the Expression of Interest stage, will identify interested Bidders. To be eligible to participate in Stage 2 and Stage 3 of the RFP, described below, interested Bidders must send a statement acknowledging receipt of this solicitation and an expression of interest to participate no later than December 14, 2017. At this point, they become “Confirmed Interested Bidders.”

RFP Stage 2, or the Collaborative Requirement Refinement stage, is voluntary and will provide the opportunity for Confirmed Interested Bidders to work in an online forum to provide input on the

technical and functional requirements of the Global FP VAN. Confirmed Interested Bidders can participate as much, or as little, as they desire during Stage 2. It is an opportunity to help refine the requirements, to learn more deeply about the needs of the community, and to better prepare for Cost & Technical proposal submission under RFP Stage 3. The draft background documentation, process flows, sample data and functional and technical requirements will be made available in an online forum called Base Camp for all Confirmed Interested Bidders to review and comment on. Base camp website, log-in credentials and instructions will be made available to Confirmed Interested Bidders by December 15, 2017. A weekly call for open Q&A will be hosted by the Global FP VAN Core Team via a call-in platform. Call-in details will be shared via Base Camp. Notes and recordings from each call will be posted for all Confirmed Interested Bidders to review on Base Camp within 1 business day of each call. It is not required as part of Stage 2, but it is encouraged, that Confirmed Interested Bidders create a sample sandbox to demonstrate the user roles and defined use case scenarios (max 6). Access to each sandbox will be limited to the respective Confirmed Interested Bidder, the selection committee and their task force members. Once all the input is gathered in Stage 2, the requirements will be finalized by the Global FP VAN Core Team and presented to the Steering Committee. Once accepted, RFP Stage 3 will begin.

RFP Stage 3, or the System Selection stage, will include the release of a RFP addendum. This addendum will include the finalized background documentation, process flows, sample data and functional and technical requirements that were developed in RFP Stage 2. It will also include detailed information on the selection process and selection criteria. Confirmed Interested Bidders from RFP Stage 2 will have an opportunity to review the finalized documents and selection criteria and respond with an intent to continue. Confirmed Interested Bidders for RFP Stage 3 will prepare cost and technical proposals on meeting the requirements. These will be evaluated following the identified selection process and criteria, and the top respondents will be invited to provide online demonstrations and showcase their solutions in a sandbox environment.

The Successful Bidder will then partner with the RHSC and key stakeholders in the implementation of a 12-month pilot (involving 2 countries, 4 suppliers and 2-3 family planning product families) to demonstrate the capabilities and benefits of this virtual collaborative platform. It is expected that if the pilot is deemed successful, it will become a longer-term initiative where the platform and its use will be expanded to scale over time to gradually cover more countries, products and manufacturers.

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<b>Implementation</b>		
	Pilot start date	April, 2018

<ul style="list-style-type: none"> <li>• Twelve-month pilot in 2 countries with 4 manufacturers, focusing on 2-3 products, to determine whether the investment required to stand up a Global FP VAN is commensurate with the benefits achieved from having done so</li> <li>• System configuration/interface development</li> <li>• User onboarding &amp; training</li> <li>• Pilot evaluation</li> </ul>	Kick Off event	April, 2018
	System Configuration / Interface Development	April / May, 2018
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	Pilot Evaluation	February/March, 2019

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

## C. RFP Stage 1 Details & Submission Instructions

### Details - Expression of Interest

RFP Stage 1, or the Expression of Interest stage, will identify interested Bidders. To be eligible to participate in Stage 2 and Stage 3 of the RFP, interested Bidders must send a statement acknowledging receipt of this solicitation and an expression of interest to participate no later than December 14, 2017. At this point, they become “Confirmed Interested Bidders.”

### RFP Stage 1 Expression of Interest Submission Content, Contact and Deadline

The Expression of Interest should be a single email that includes:

- › A statement acknowledging receipt of the solicitation on behalf of which company
- › 2-3 sentences expressing interest in participating in the RFP process, on behalf of which company
- › Name and contact information, including email address, for the key point of contact

The Expression of Interest should be submitted to [GlobalFPVAN@rhsupplies.org](mailto:GlobalFPVAN@rhsupplies.org) by December 14, 2017. This email address will only be used for the Global FP VAN and monitored the Core Team

involved in the RFP selection process. Expressions of Interest received after this deadline will not be considered.

## D. RFP Stage 2 Details & Submission Instructions

### Details - Collaborative Requirements Refinement

The RFP Stage 2 offers the opportunity for Confirmed Interested Bidder to voluntarily participate in refining the technical and functional requirements in an open and transparent manner. Confirmed Interested Bidders can participate as much, or as little, as they desire during Stage 2. It is an opportunity to help refine the requirements, to learn more deeply about the needs of the community, and to better prepare for the Cost & Technical proposal submission under RFP Stage 3. The items listed in the Base Documentation Table below will be provided in an open forum. The open forum is comprised of both weekly conference calls as well as a virtual workspace hosted in Base Camp where the draft requirements will be refined. Base Camp log-in credentials and instructions will be made available by December 15, 2017 via email to Confirmed Interested Bidders. A weekly call for open Q&A will be hosted by the Global FP VAN Core Team via a call-in platform. Call-in details will be shared via Base Camp. Notes and recordings from the weekly calls will be posted on Base Camp within 1 business day of each call. Bidders will have equal opportunity to participate in these calls and provide input. The documentation and examples in the Base Documentation Table will be provided by the RHSC and used to shape these discussions and ensure similar context across audiences:

BASE DOCUMENTATION TABLE		
People	Process	Tools
--DRAFT--	--DRAFT--	--DRAFT--
<ul style="list-style-type: none"> <li>• Role Definitions</li> <li>• Persona Descriptions</li> <li>• Security/Access Model</li> </ul>	<ul style="list-style-type: none"> <li>• Use Cases (max 6)</li> <li>• Detailed Scenario per Use Case</li> <li>• Process Maps (max 6)</li> <li>• Process KPIs</li> </ul>	<ul style="list-style-type: none"> <li>• Data Sharing Security Classification</li> <li>• Systems / Architecture Diagram</li> <li>• Interface List of systems that will be providing data in the ToBe state (estimated 12-20)</li> <li>• “Scrubbed” / anonymized data samples for each interface that is critical to enabling the Use Cases</li> <li>• Master Data definitions and corresponding lists (Product/Vendor/Facility Master)</li> </ul>

It is not required as part of Stage 2, but Confirmed Interested Bidders are *strongly encouraged* to create a sandbox environment for preview of the selected Use Case Scenarios for further describing requirements. There will be a maximum of 6 scenarios/process flows. Access to each sandbox will be limited to the respective Bidder, the selection committee and their task force members.

Once all the input is gathered in Stage 2, the final requirements and decision criteria will be approved by the Global Family Planning VAN Steering Committee.

## **RFP Stage 2 Submission Content, Contact & Deadlines**

### *Base Camp*

Each Confirmed Interested Bidder will receive log-in credentials and instructions to the Base Camp online forum by December 15, 2017 via the email they used to submit their Expression of Interest.

### *Weekly call-in platform*

Weekly calls will be held each Friday of the RFP Stage 2, starting December 15, 2017 and ending January 19, 2018. Call-in details, notes and recordings will be shared via Base Camp to ensure that all Confirmed Interested Bidders can call-in, or read the notes and listen to the recordings.

## **E. RFP Stage 3 Details & Submission Instructions**

### **Details - System Selection**

In the RFP Stage 3 - System Selection stage, the RHSC will release an RFP Addendum on January 29, 2018, open to Confirmed Interested Bidders who submitted an official expression of interest by December 14th, that will include;

- › A request for re-expression of interest to bid;
- › Finalized Functional and Technical Requirements for implementation (from RFP Phase 2); and
- › Further definition of final proposal requirements and selection criteria.

Cost & Technical proposal materials submitted by Confirmed Interested Bidders will be reviewed and evaluated based on set criteria that will be shared with the RFP Addendum. Short-listed finalists will provide a virtual demonstration to be scheduled between February 27 and March 1<sup>st</sup>, 2018. A sandbox environment with generic user accounts for each role must be provided for 2-weeks post demonstration to allow the selection committee to test the experience.

The aim of each submission is not just to establish the value of a technology solution for each Use Case Scenario, but rather to also show how each Confirmed Interested Bidder would partner in conducting the 12-month pilot that demonstrates the greater efficiency and effectiveness of a Global FP VAN in terms of forecasting, supply planning, and exception-based management when compared to similar, existing systems. The results of the pilot will inform the decision whether to scale-up the Global FP VAN and pursue additional funding.

The final evaluation and selection criteria will be released with the RFP Addendum in RFP Stage 3 with the final functional and technical requirements derived from RFP Stage 2. It will include technical, project team experience and financial criteria. In addition, the RFP Stage 3 responses will be measured using a comparative scoring system that assesses capabilities that assesses capabilities across the final use cases and key criteria. These are expected to fall within key themes, such as the following:

- (1) Interoperability,
- (2) Inbound visibility of shipments to countries,
- (3) Visibility for collaborative planning and adjustment across stakeholder organizations; and finally
- (4) Fundamentals for technology partnership in the project.

Though the final requirements will be refined and derived from RFP Stage 2, the following examples should provide context on the desired measures:

*(1) Interoperability:*

- › Demonstrate what would happen if we had one location where users from the different organizations had their own login and data access governed by security protocols, where each user could create dashboards, and where we could create cross-donor/cross-country dashboards that could also import/export for analysis elsewhere
- › Demonstrate low barriers for data import/export/direct feed coming from disparate partners and sources using various personas provided (low to high complexity interactions). This should showcase the ability to quickly import data manually as well as demonstrate the ability to implement full EDI.
- › Demonstrate the system's ability to align to GS1 standards while providing backward compatibility/capability for working with those that have not yet adopted GS1. Demonstrate the system's ability to connect to a GDSN for master product and location synchronization.

*(2) Inbound Visibility:*

- › Demonstrate what would happen if we could see and monitor inbound shipments from our Suppliers/Freight Forwarders to Central Medical Stores in-country in one location
- › Demonstrate what would happen if we could see and monitor all the approved requisitions and purchase orders coming from UNFPA and USAID to our Suppliers in one location with the potential to add other procuring organizations.

*(3) Collaborative Planning & Adjustment:*

- › Demonstrate what would happen if we could have the current country Central Medical Store stock-on-hand, average monthly consumption and country contextual information (request, notes, etc.) imported directly without additional intervention.
- › Demonstrate what would happen if current country supply plan data could be imported in its existing format without additional intervention and could be standardized in its presentation based on "business rules," allowing for tracking of funded versus funding gaps and exception management for human intervention

*(4) Technology Partnership Core Competencies:*

- › Demonstrate proposed approach to implement, configure and maintain a system/platform with minimal need for custom software development that meets the technical and functional requirements defined in RFP Stage 1 and an optimal approach to working with the identified organizations to create and test the necessary data integrations
- › Demonstrate a proven track record on providing visibility with global supply chains
- › Demonstrate the plan for an ongoing delivery & support model that demonstrates near seamless upgrade processes; a customer support model; with a focus on configuration over development
- › Outline a plan for initial and continuous user training that includes working with the RHSC to develop training guide(s) relevant to each role as well as to define and participate in training rollout

- › Outline a launch approach given the desire to take the Global FP VAN to scale. Describe an optimal approach for working with the RHSC to facilitate the implementation launch in the two countries. Describe an optimal approach for working with the RHSC to facilitate the launch with members and operators of the control tower.
- › Demonstrate reporting functionality for both tracking project/process KPIs and working with the RHSC on developing the necessary in-country reports and dashboards
- › Outline the Recommended Approach for Support & Maintenance including providing tier-2 support for users of the system for the duration of the pilot. Additionally provide at least one design/re-configuration step half way through the pilot to account and adjust for new learning
- › Outline a plan for developing the necessary documentation for the standard operating procedures for each role, including the steps necessary for onboarding additional users, products and countries.

## **RFP Stage 3 Submission Content, Contact and Deadlines**

### *RFP Stage 3 Re-expression of Interest*

Confirmed Interested Bidders that are interested in submitting a full Cost & Technical Proposal under RFP Stage 3 need to re-express interest via email by February 1<sup>st</sup>, 2018. The Re-expression of Interest should be a single email that includes:

- › A statement acknowledging receipt of the RFP Addendum on behalf of which company
- › 2-3 sentences expressing interest in submitting Cost & Technical Proposal under the RFP Stage 3, on behalf of which company
- › Name and contact information, including email address, for the key point of contact

The Re-expression of Interest should be submitted to [GlobalFPVAN@rhsupplies.org](mailto:GlobalFPVAN@rhsupplies.org) by February 1st, 2018. This email address will only be used for the Global FP VAN and monitored the Core Team involved in the RFP selection process. Re-expressions of Interest received after this deadline will not be considered.

### *RFP Stage 3 Fact-Finding Questions*

Questions regarding the RFP Stage 3 procurement process, as well as technical and program questions, will be accepted via email to [GlobalFPVAN@rhsupplies.org](mailto:GlobalFPVAN@rhsupplies.org) through February 2, 2018. Inquiries after this date cannot be accommodated. Please identify in the subject line whether it is a

procurement question or a technical/program question. This email address will only be used for the Global FP VAN and monitored by the Core Team involved in the RFP selection process. Questions asked via the [GlobalFPVAN@rhsupplies.org](mailto:GlobalFPVAN@rhsupplies.org) email by February 2, 2018 will be answered during a call with Confirmed Interested Bidders on February 7, 2018 to ensure transparency. Please note that responses will not be confidential except in cases where proprietary information is involved.

### *RFP Stage 3 Full Proposal Requirements - Financial & Technical Implementation*

Finalized proposal requirements will be defined in the RFP Addendum released on January 29, 2018, but key proposal requirements are being shared now in preparation and to assist forward planning. Both the Cost & Technical Proposal materials outlined below are due by February 21, 2018. Material submission instructions will be included in the RFP Addendum. Cost & Technical Proposal submissions received after the deadline will not be considered.

### **RFP Stage 3 Proposal Requirements - Financial**

RFP Stage 3 Confirmed Interested Bidders must submit itemized costs for the total implementation scope of this project, based on the implementation scope of work and deliverables outlined above 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:

Provide details of total cost including a breakdown of the following;

- > Software Development and Configuration costs
- > Licensing Costs
- > Training costs
- > Support costs

In each of these sub categories, please breakdown total costs with the following information:

- > 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., profit, travel, sub-contracted resources, administrative costs, supplies, tax, etc.

### **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.

Indirect rate allowances: These rates are maximum allowances to certain organization types according to the funder of the project. 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 and for-profit organizations.
- › Rates apply both to the primary grantee, subgrantees, and subcontracts that are part of the proposal.

Please note, in so far 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 e.g, newly acquired facilities costs that can be allocable to the project are acceptable as direct costs. Where indirect rates are submitted, there should be a list of activities included of what this typically covers.

### ***RFP Stage 3 Proposal Requirements - Technical Implementation***

The RFP Stage 3 Confirmed Interested Bidders will provide a concise set of documentation and an implementation proposal by February 21<sup>st</sup>, 2018, in response to the finalized functional and technical requirements from the RFP Stage 2, to be sent by the RHSC in the RFP Addendum. The overall content should address the vision and Use Case Scenarios as described herein as well as the requirements finalized in the RFP Stage 2.

Provide a narrative on your technical approach to accomplish the implementation 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 risks and issues and plans to overcome/mitigate them.
- › Identification of major internal and external resources.
- › Describe the approach for deploying upgrades
- › Describe the method by which enhancements are merged into the core product
- › Describe any points that will require custom development and explain why these are necessary
- › Describe your customer support model including the approach to user training.

Provide information on your overall qualifications, including:

- › Profile of relevant corporate qualifications.
- › Profile of relevant experience and examples of related work for creating visibility on a global supply chain and for provisioning SaaS solutions.
- › Qualifications of key members of the proposed project team (attach CVs and provide details of back-up/standby teams).
- › Number of years in business.
- › Annual revenue
- › If your company has more than one location, please indicate these qualifications for the site that is responding.

### *RFP Stage 3 Demonstrations and Sandboxes*

The Cost & Technical proposal will be reviewed and evaluated based on set criteria that will be shared with the RFP Addendum. Short-listed finalists will provide a virtual demonstration to be scheduled between February 27 and March 1st, 2018. A sandbox environment with generic user accounts for each role must be provided for 2-weeks post demonstration to allow the selection committee to test the experience.

# V. Terms and Conditions of the Solicitation

## A. Notice of non-binding solicitation

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

## C. Conflict of interest disclosure

Suppliers bidding on the RHSC business must disclose, to the procurement contact listed in the RFP, any actual or potential conflicts of interest. Conflicts of interest could be present if; there is a personal relationship with a RHSC 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 the RHSC. Suppliers and the RHSC are protected when actual or perceived conflicts of interest are disclosed. When necessary, the RHSC 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 the RHSC indicated in Section VIII. A. Contacting third parties involved in the project, the review panel, or any

other party may be considered a conflict of interest, and could result in disqualification of the proposal.

## **E. Acceptance**

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

## **F. Right to final negotiations**

The RHSC 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 the RHSC's sole and full discretion in such negotiations.

## **G. Third-party limitations**

The RHSC 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 the RHSC in any way without our express written consent.

## **H. Proposal Validity**

Proposals submitted under this request shall be valid for 120 days from the date the proposal is due. The validity period shall be stated in the proposal submitted to the RHSC.