GLOBAL FP VAN CASE STUDY

TECHNOLOGY QUADRANT

Forging a "Collective Ask" of the Global FP VAN Technology Vendor

Reproductive Health SUPPLIES COALITION

Global FP VAN
Global Family Planning Visibility & Analytics Network

“

You cannot manage what you cannot see

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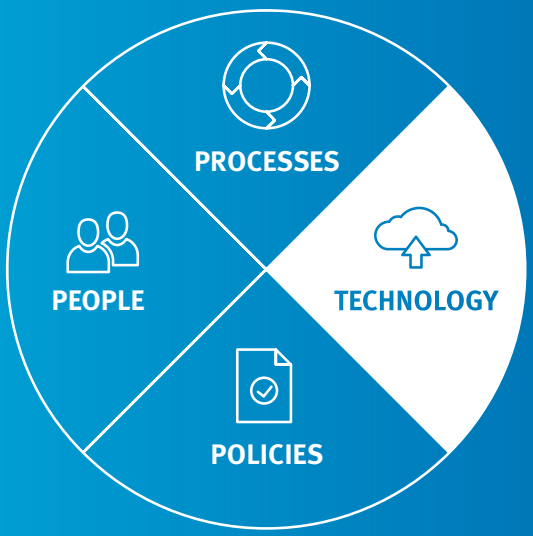

Global FP VAN: A new vision for collaborative supply chain management

The reproductive health (RH) community has long known that limited access to a choice of quality, affordable contraceptives severely undermines efforts to increase contraceptive prevalence.[1] Furthermore, supply chain data visibility is a prerequisite to increased access. Simply put, "You cannot manage what you cannot see." Governments, global procurers, and other actors need timely access to supply chain data for effective decision-making, including for estimating supply needs, accessing planned orders, tracking shipment status from manufacturers to countries, acting when products arrive, and advocating if funding falls short.

In 2016, the RH community called on the Reproductive Health Supplies Coalition (RHSC) to take the lead in defining and operationalizing a more coherent and efficient way to gather and use data for family planning (FP) supply chain decisions. The following year, RHSC embarked on an 18-month proof-of-concept to establish a Global Family Planning Visibility and Analytics Network (Global FP VAN) that brings together people, processes, policy, and technology to transform the way the community makes supply chain decisions.

From the people side, the Global FP VAN is meant to link procurers, manufacturers, shippers, and country governments in an active network focused on product flow into countries. In terms of technology, the platform captures data from many sources, facilitates data harmonization, and consolidates tools for network members to use. New processes transform how these members interact, analyze data, and make decisions. And lastly, harmonized policies govern data sharing and use.

To ensure effective coordination across these Global FP VAN stakeholders, RHSC established a governance structure (Figure 1) that comprises the following: a Steering Committee[2] to set strategic direction, define and/or approve strategic deliverables and milestones, and, as needed, delegate "endorsers" from their respective organizations to accomplish the work; a Management Unit to coordinate and manage Global FP VAN activities; and four Task Forces to accomplish discrete tasks, such as developing data-sharing agreements or defining data-governance processes.

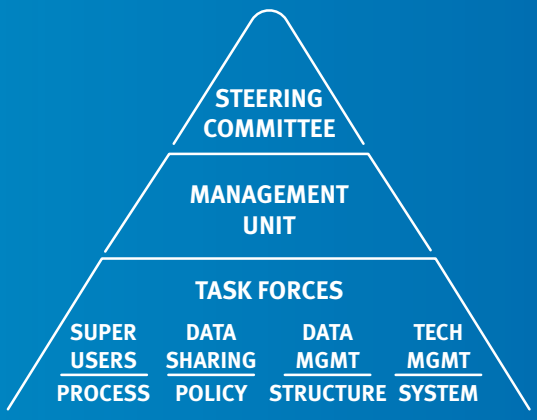

Figure 1. Global FP VAN Governance Structure

By offering a platform to collectively estimate and prioritize supply needs, take action when supply imbalances loom, and advocate for funding when necessary, the Global FP VAN will ultimately lead to more timely and cost-effective delivery of commodities, more women reached with the right product at the right time and a better allocation of limited health resources in the future.

The present case study focuses on the technology quadrant of the Global FP VAN framework. It is part of a series of case studies documenting the key learnings from the Global FP VAN proof-of-concept phase.

1. Hussain R et al., Unmet Need for Contraception in Developing Countries: Examining Women's Reasons for Not Using a Method. New York: Guttmacher Institute; 2016.https://www.guttmacher.org/report/unmet-need-for-contraception-in-developing-countries.

2. Steering Committee members include the following: Bill & Melinda Gates Foundation, UK Department for International Development (DFID), US Agency for International Development (USAID), and United Nations Population Fund (UNFPA), plus one user representative from John Snow, Inc (JSI).

Forging a Collective Ask: Context

In March 2018 the RHSC, as the host of the Global FP VAN, selected a software-as-a-service technology solution vendor to provide a solution that could be configured to establish the Global FP VAN collaborative platform. This marked the culmination of four months of a rigorous multistage tendering process that comprised three phases: (1) the Request for Proposal (RFP) release and vendors' expression of interest (EOI); (2) a collaborative requirement refinement phase, which concluded with the publication of an RFP Addendum; and (3) the vendors' proposal submission and demonstration of their technology solution and the final vendor selection.

As the Management Unit began planning for the technology vendor selection process, it realized that there were critical issues that the Global FP VAN stakeholders—especially members of its Steering Committee—needed to consider:

1. The Global FP VAN stakeholders needed to define and agree on what they wanted from the technology platform and communicate these requirements to the interested vendors. Given the complexities in designing a Global FP VAN, the Management Unit believed that the community's requirements of the technology solution and the different vendors' proposal offerings would be best balanced if each had a chance to interact, ask questions, and see each other's thinking and tools.
2. In order to imagine how technology could improve their work, the users wanted to be able to "test drive" the vendors' proposed technology solutions and discuss as a group, with the interested vendors, how these solutions would make their current processes more efficient.
3. There was a real need to reassure some in the community that the Steering Committee was not going to rush into a decision about the system selection. In some ways the community ownership for the Global FP VAN was tied to the system selection. "A collaborative, systematic system selection process was necessary to promote future ownership and buy-in to the Global FP VAN" (Julia White, Global FP VAN Management Unit). The tendering process needed to allow for the formulation of a "collective ask" of the technology vendors. It also needed to give the interested vendors the same opportunity to interact with the Global FP VAN users and offer a free trial of their technology solution as part of the RFP.
4. Unlike a traditional bidding process between a contractor and interested bidders, the Global FP VAN system selection involved a community of stakeholders, including multiple donors. As such, the Global FP VAN tendering process and final contract terms needed to be robust and transparent and able to meet the procurement requirements of both current and future donors.

How was it done?

A condensed timeline, tangible milestones and a committed community of learners

The Management Unit designed a three-stage and highly structured tendering process, which combined a traditional Request for Information (RFI) with an RFP. This allowed for the system selection process to move quickly and yet still enabled the Global FP VAN community and the interested vendors to interact early on and, together, define what it was that the community wanted of the software solution.

Learning took a central stage in the tendering process. The idea was to test not only the technology but also vendors on their ability to learn from, and with, the Global FP VAN community as the latter embarked on this journey to establish the VAN. For this purpose, the tendering process was designed to get the Global FP VAN users and the vendors to engage, consider different perspectives, rearticulate the technology requirements based on these perspectives, and feed that back into the final requirements and RFP Addendum.

A condensed four-month timeline that identified tangible milestones, including critical decision-making points along the way, helped the Global FP VAN stakeholders hold each other accountable to deliver on those milestones.

Just as importantly, by not allowing too much time to elapse between milestones and decision-making points, the compressed timeline helped ensure that the final RFP with its agreed-upon requirements addressed the actual needs of the Global FP VAN community. “The longer you take to deliver on something, by the time you deliver it, [the more likely] the situation on the ground has changed, stakeholders’ needs have changed, and/or the way they articulate those needs have changed (...) and the risk [for the vendors] of delivering on the wrong targets increases” (Stew Stremel, Global FP VAN Management Unit).”

RFP STAGES & MILESTONES

NOV. 22 – DEC. 14

STAGE 1

- Release of RFP, inviting interested bidders to submit an Expression of Interest (EOI)

DEC. 15 – JAN. 19

STAGE 2

- Collaborative requirement refinement Sandbox v1
- Publication of RFP
- Addendum with agreed-upon requirements

JAN. 29 – MAR. 14

STAGE 3

- Vendor proposals deadline
- Demonstrations & sandbox v2
- Scoring and recommendations
- Selection of vendor

STAGE 1 Identification of interested vendors—the Expression of Interest (EOI) phase

In November 2017 the Management Unit issued an RFP, which kicked off the vendor selection process and invited all interested bidders to send an EOI. Opening the RFP to all technology solution companies allowed the Management Unit to capture and identify the vendors interested in participating in the collaborative requirement refinement (stage 2) and the system selection (stage 3). It also leveled the playing field for the technology companies by giving them all an equal chance to participate in, bid on, and win the RFP. By the December 14 deadline, the Management Unit received EOI responses from eight technology solution companies. These confirmed interested bidders could now participate in the collaborative-requirement phase and interact and learn about the Global FP VAN community's needs.

STAGE 2 Forging of a "collective ask" of the technology vendors—the collaborative -requirement refinement phase

Given the complexities of designing a Global FP VAN to satisfy the needs of a diverse group of users, the Management Unit brought together the eight interested vendors and the Global FP VAN users and encouraged them to engage and understand one another's different tools and perspectives.

To this end, the Management Unit introduced an online collaborative software called Basecamp© and invited the members of the Global FP VAN Task Forces and the vendors to use the interactive forum to provide input on the technical and functional requirements of the future platform.

On Basecamp, the vendors and no fewer than 40 Task Force members[3] could simultaneously view and provide feedback on key documents—background documentation, process flows, sample data, and functional and technical requirements—as these were being developed. The Task Forces members' level of engagement and contribution during this phase cannot be overstated. They provided input across process, policy, structure, and system documents, which they published on Basecamp between December 2017 and January 2018. "The Task Forces played a critical role in defining the system requirements. This process is usually lengthy when done with one organization, but imagine when it has to be done with multiple organizations, in record time!" (Ramy Guirguis, USAID). This exercise also made it possible for the Task Force members to learn about current best practices in supply chain software directly from the vendors.

> *"This was not a typical RFP, where requirements are set in advance. Instead, I saw a unique approach in Basecamp where it was collaborative across the community, including the vendors. The community helped us [vendors] finetune the requirements (…) something I have never seen in my 18-years career. The Management Unit kept us aligned so that together we could come up with a solution. No one was left out. I knew each time I entered our weekly calls that I was given the same information as everyone else, and so I shared and took as much information as I could to help with the process. Everyone got a fair chance."*
>
> *—Koushik Balasubramanian, formerly with E2open*

This collaborative stage to refine requirements also offered the vendors a chance to learn more about the needs of the Global FP VAN community and gather the necessary information for the cost and technical proposals they would be submitting.

The eight vendors were encouraged to participate in Basecamp. They could, however, opt out of the collaborative requirement phase at any point and still submit a proposal.

The Global FP VAN Management Unit hosted weekly calls for open Q&A with all stakeholders and posted agenda, minutes, and recordings from each call on Basecamp within one business day for all to see.

Initially, a few vendors were cautious about collaborating in Basecamp. They were reluctant to ask questions and disclose the information they were seeking. It took a high level of facilitation skills on the part of the Management Unit to create a space where vendors felt comfortable interacting with the rest of the community and could realize the value of collaborating with the other vendors.

3. Many of the Task Force members were drawn from the Super Users Task Force and included procurers, data analysts, manufacturers, and country actors.

> *"One of the biggest successes of the Global FP VAN Management Unit was putting together the RFP Addendum and being able to work across every endorser, every organization, getting their feedback and putting it right back in front of them, and do that repeatedly and fast."*
>
> *—Stew Stremel, Global FP VAN Management Unit*

From the vendors' perspective, Basecamp and the weekly calls for open Q&A created a culture of reciprocity, where both the vendors and the Global FP VAN users became "learners" working together to solve a problem. "We were able to communicate in that forum very collaboratively (…) there were also contributions from other vendors that made a lot of sense, given the problem we were trying to solve. We were able to hone the requirements to benefit the whole community." (Koushik Balasubramanian, formerly with E2open).

The interested vendors were then encouraged to create a software sandbox to allow the Global FP VAN users to get a click-through view of how the technology platform might look and function in their systems. Access to each sandbox was to be limited to the respective vendor and the members of the Global FP VAN Task Forces. The idea was that each software sandbox—a "try it before you buy it" environment—would give the vendors an opportunity to demonstrate that they would be able to provide the users with a technology solution that meet their needs.

The Global FP VAN Management Unit incorporated input gathered throughout this collaborative stage, plus all the resulting requirements, into an RFP Addendum and submitted it to the Steering Committee for review and ratification. This marked the closure of the information-gathering phase and the end of Basecamp and Stage 2.

STAGE 3 Kick-off of the traditional proposal submission and system selection

The system selection got under way on January 29th with the publication of the RFP Addendum and the kick-off of a traditional proposal review process. This Addendum included the finalized background documentation, process flows, sample data, and functional and technical requirements that were developed in Stage 2 during the collaborative requirement refinement stage, as well as detailed information on the vendor selection process and criteria.

After a Q&A period, interested vendors submitted cost and technical proposals describing how their technology solution would address the requirements outlined in the RFP Addendum. An Evaluation Committee scored the proposals in three areas: (1) technology solution, including general system requirements, technical operational requirements, and functional capabilities from a user-expectations perspective; (2) cost model; and (3) partnership, including each vendor's management approach and experience.

The short-listed finalists were then invited to provide further demonstration and sandbox time. The Evaluation Committee further refined and justified their scores.

On March 14, 2018, the multistage tendering process led to the selection of E2open.

This was a significant achievement insofar as it brought to a close years of ongoing debate within the RH community over system selection and the types of systems that would be most appropriate for this particular task at hand. With the new technology vendor on board, the Global FP VAN community could now launch and pilot the Global FP VAN in-country, starting with Malawi and Nigeria.

> *"For the Global FP VAN—and for that matter the RHSC—collaboration and a level playing field are key priorities. Through the selection process, we wanted to forge a transparent, collective "ask" of the vendors and see, objectively, who could offer the best solution in response."*
>
> *—Julia White, Global FP VAN Management Unit*

Key learnings

Need for a secure collaborative space that allows for transparent and continuous communications

Aligning a technology solution with the needs of those who will use it is an iterative process that requires continuous and transparent communications. Users need to define what meets their needs, while vendors need to know what users want so they can adjust their offerings accordingly. To this end, providing users and vendors with a secure, virtual, collaborative space to access and share background documents, provide input into the business requirements, and ask questions helped the entire user community come together around what it needed from the technology solution. Most importantly, it allowed all those involved to see that their interests would be treated fairly and that decisions would be made based on the best possible solution for the task at hand, and not to favor the priorities of one organization over another.

Value of a separate, neutral, backbone organization with the ability to focus stakeholders' attention and create a sense of urgency

Having in place a Management Unit with a dedicated staff, separate from the Global FP VAN stakeholder organizations, was critical to the vendor selection process. The Management Unit helped strike a balance between moving things forward and making sure that every user group's interest is considered.

Also, because coordination takes time, having a Management Unit with the right skill set—to manage and support the vendor selection process through ongoing facilitation, continuous communications, and introduction of private-sector tools such as Basecamp and the Agile project management approach[4]—was essential.

Lastly, the Management Unit helped focus the Global FP VAN community on the task at hand. By introducing an aggressive timeline with tangible milestones and by requiring frequent stakeholder feedback, the Management Unit applied pressure on the stakeholders to deliver without overwhelming them.

Need for going beyond the virtual

While the virtual collaborative software Basecamp improved collaboration across the diverse Global FP VAN community, there remained issues that technology alone could not fix—issues that required in-person consultations. This was especially true for country representatives and certain manufacturers. In November 2017, RHSC hosted a current and future state validation workshop, which made it possible to capture the input of country representatives on the business requirements. The Management Unit also relied on RHSC Secretariat staff to conduct in-person meetings with the manufacturer where needed to discuss the Global FP VAN and engage them from the onset on the vendor selection process.

4. Agile is a project management approach broadly used in digital transformation initiatives, which focuses on continuous improvement, scope flexibility, team input, and delivering of essential quality products at a regular cadence. The Management Unit applied Agile principles in the Global FP VAN vendor selection process.

Conclusion

Laying the foundation for a long-term and productive relationship between the Global FP VAN community and the technology solution vendor

From the onset, the Global FP VAN stakeholders embraced the idea of a more flexible and unconventional tendering process that combined a request for information with a traditional RFP. The innovative procurement model allowed the community to capture the largest number of technology solution firms into the RFP process. It also promoted open dialogue between the interested vendors and the Global FP VAN community, before the release of the detailed Addendum and kick-off of the more traditional proposal review process. The result was transformative for E2open and the Global FP VAN community in that it helped them lay the foundation for a productive and long-term partnership to achieve the vision of the Global FP VAN.

> *"Issuing the RFP and selecting the vendor—this was one of the most difficult things to do. And we did it in a collaborative environment with multiple agencies and in a record time. The fact that we were able to agree on the RFP [and] on the selection process, and having a contract in place in less than four months. To be able to make decisions in a way that everyone supports. This was not easy, and it was a huge accomplishment."*
>
> *—Ramy Guirguis, USAID*

THE REPRODUCTIVE HEALTH SUPPLIES COALITION & THE GLOBAL FP VAN

In 2016, members of the RH community asked the RHSC to take the lead in defining and operationalizing a more coherent and efficient way to gather and use data for upstream supply chain decisionmaking. The vision was to act on that request and put in place a Global Family Planning Visibility and Analytics Network (GFPVAN, or VAN). The VAN is meant to bring together people, processes, policy and technology to transform the way our community makes supply chain decisions. It offers a platform to collectively estimate and prioritize supply needs, and people and processes to act when supply imbalances loom, and policy to govern data sharing and use. Eventually, a well-functioning VAN will lead to more timely and costeffective delivery of commodities; more women reached with the right product at the right time; and a better allocation of limited health resources.

The present case study focuses on the technology quadrant of the Global FP VAN framework. It is part of a series of case studies documenting the key learnings from the Global FP VAN proof-of-concept phase.