# Request for Proposals


## TA Event Management Software using SharePoint Online 2013


## Proposal Due Date: May 5, 2014

Please list questions here: http://groups.google.com/d/forum/fhi360-rfp-qa

Contact person for RFP: Hoang Hai Chau, chau@fhi360.org

## ABOUT FHI360 AND SMART TA

FHI 360, an international NGO, works in collaboration with the Government of Viet Nam (GVN), PEPFAR, other key stakeholders, and over 30 local agencies to implement SMART TA. The USAID Sustainable Management of the HIV/AIDS Response and Transition to Technical Assistance Project – or "SMART TA" – is a five-year initiative that strives to ensure the provision of quality comprehensive and sustainable HIV services through a strengthened national response.

## BACKGROUND

As more countries are moving into middle income status, development agencies are beginning to move away from direct services delivery to providing only technical assistance (advice + training + money). What this means is that SMART TA is moving away from the day-to-day administering of projects to instead play a more consulting role.

## SCOPE OF WORK

The purpose of this contract is to retain the services of a contractor to develop a customized software system to track and manage the progress of technical assistance (TA) engagements, and to calculate relevant TA indicators. Examples of such TA engagements may include:

- A government partner asks FHI360 to provide guidance on improving clinical practice guidelines (pull TA)
- SMART TA begins to support Hai Phong provincial AIDS center to use the "cascade framework" for better strategic direction (push TA)

In each of the examples above, the system would track:

1. Which organizations are involved and at which level (national, sub-national, or site)
2. Type and method of each engagement
3. Which SMART TA staff is involved
4. Corresponding SMART TA deliverables and MER indicators
5. Keywords defining the event and technical unit involved
6. Summaries and any attachments.

### WORKFLOW

An event report will be filed at the end of each TA event and summarize the reason and output for each TA engagement. Each form has basic information such as what organization was involved, what TA method/type was used, and which deliverable this TA activity was related to.
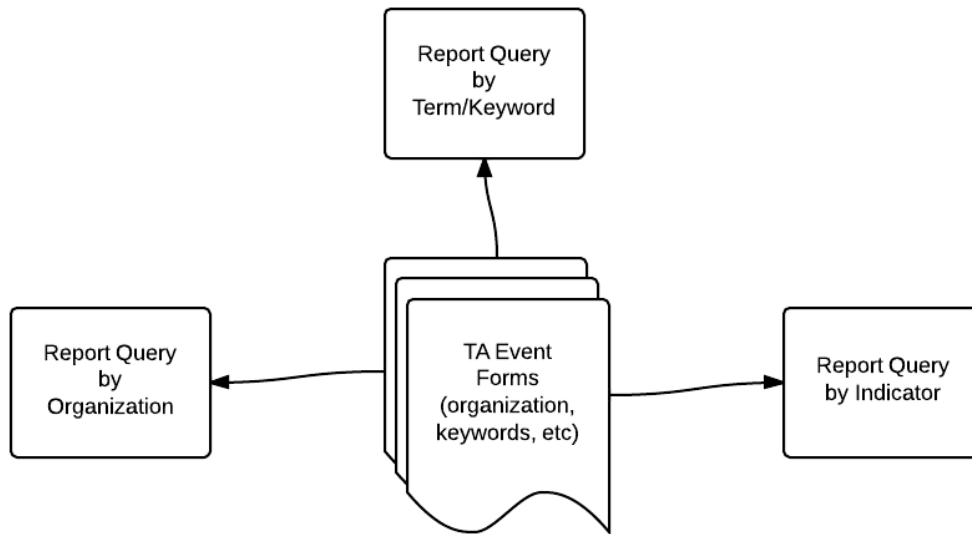
Each type of information submitted from the form can be independently and dynamically queried and shown in relation to other types of information. For example, a query of an organization will also show all the TA events related to such an organization (and also who was involved).

We have created a mockup of the main TA submission form here: **https://fhi-vn.mybalsamiq.com/projects/xrm/**. Please note that we place a large emphasis on a clean and friendly user interface. There also is a system from Jordan that operates on a similar idea. Please use this video as a starting point for ideas, not as a final plan! Our system will be very different than the Jordan system, but the underlying principles will be similar: http://sdrv.ms/1gVt9DT. Please watch from 2:15 minute to 5:40 for the entry form, and from 13:20 to 19:20 for the query reports.

## GENERAL REPORTING REQUIREMENTS

Each event will have specific information that can be aggregated into an indicator report by simple query. This back-end user interface will be used to access key performance indicators and to generate standard reports. An annex will be provided to each contractor that contains a table that describes the required indicators and how to collect information from each event.

## MER REPORTING REQUIREMENTS

MER is a new PEPFAR reporting requirement and stands for Monitoring, Evaluation and Reporting Implementation. The MER system collects data from over 44 indicators disaggregated by site, above site, and national levels. It further disaggregates by direct service delivery or TA. Further requirements for MER reporting will be developed and presented to the contractor.

## CHOICE OF PLATFORM

We will recommend you use the SharePoint Online 2013 platform, but you may justify the choice of another platform. FHI360 has a current subscription of SharePoint Online 2013 through the Office365 platform, but we are open to an on-site version of SharePoint as well.

## FLEXIBLE REQUIREMENTS

The requirements for this project moves quickly. The developer would need to quickly adapt to new requirements and changes.

## PROPOSED TIMELINE

The active project development time is expected to be 2 months in duration; vendor efforts to advance this timeline are encouraged. FHI360's estimate of the timeline is the following:

| Overview: | Deliverables: | Recommended Time Frame |
|---|---|---|
| Understanding the current situation in FHI360 and finalize development plan | • Finalize development plan after virtual meetings with key staff | 1 week |
| Software Development | • Programming and real-time testing | 1.5 months |
| Implementation Training and Support | • Please provide options for SLA or time/hour based maintenance fee<br>• We will make the system as easy to use as possible in order to limit training | 3 months support package or SLA format |

## SUBMISSION OF PROPOSALS

- Please submit a proposal through email to Nguyen Thi Thanh Ha, Operations Manager at thanhha@fhi360.org before the deadline
- Contact person for the RFP is Hoang Hai Chau at chau@fhi360.org
- The response must detail any use of subcontractors. Otherwise, vendors must obtain explicit approval from FHI360 for the use of any subcontractors

| Date | Action |
|---|---|
| April 21-25th | RFP Released. We require a quick conference call with us to learn more about the project. Questions and answers received through email will also be posted to this online forum. |
| April 27th | Last day for questions and for conference call |
| May 5th | Deadline for proposals (end of day) |
| Two weeks later | Vendors notified of their selection result. FHI 360/ Vietnam will work with the selected agency to develop a sub-award under which the agency will implement the project. The selected agency is expected to commence work as soon as the sub-award has been signed |

FHI 360/ Vietnam reserves the right to reject any and all proposals and to negotiate the terms of the sub-award, including the sub-award amount, with the selected agency prior to entering into an award. If sub-award terms cannot be agreed upon, FHI 360/ Vietnam may negotiate with the next-highest-scoring agency. FHI 360/Vietnam creates no obligation, expressed or implied, by issuing this request for proposal or by receipt of any responses submitted. The mutual obligations and responsibilities of FHI 360/Vietnam and the successful agency will be recorded in the sub-award. FHI 360/Vietnam is under no obligation to sign a sub-award with any agency should negotiations regarding terms be unsuccessful.

## EVALUATION CRITERIA AND CONTENT OF SUBMISSIONS

Content of submissions is up to you. Please address the evaluation criteria below.

| Evaluation Criteria | Weight |
|---|---|
| Demonstrate if/how Sharepoint can manage the data in an easy to use way <br><br> • Give one or two substantive ideas on how to improve this product and why you think that would be helpful. <br><br> • Simplicity, simplicity, simplicity! This software should lessen the burden of staff, not increase workload through extra trainings or procedures. This software should work in the same way. | 20% |
| Demonstrated prior experience <br><br> • Show us examples of user interfaces you have designed for previous clients <br><br> • Show any similar projects you have worked on | 35% |
| Price <br><br> • Proposed cost, fees and expenses of system, including implementation, training, etc. <br><br> • Requirements and solutions may evolve rapidly throughout the development process. Because of this, please provide in your response options how you manage and bill additional requirements that are outside the original scope (and what is considered a requirement that is large enough to be considered out of scope). | 45% |