



Request for Proposals  
**Pact DHIS2 System:  
Development and Implementation**  
RFP# PGA0013-2018-01

Date of issuance:	April 24, 2018
Due date for questions:	April 30, 2018
<ul style="list-style-type: none"><li>• Questions sent to <b>mreilley@pactworld.org</b> (no calls!)</li><li>• Emailed questions must contain the subject “DHIS2 RFP Questions”</li></ul>	
Responses to all questions provided to all bidders:	May 4, 2018
RFP Closing Date:	May 13, 2018, 11:59 PM EDT
<ul style="list-style-type: none"><li>• RFPs sent to <b>mreilley@pactworld.org</b></li><li>• Emailed submissions must contain the subject “DHIS2 RFP Response”</li></ul>	
Estimated award date:	May 31, 2018

## Table of Contents

1. Background .....	3
2. Scope of Work.....	4
2.1 Review Pact’s data management processes and structure to design an appropriate information system architecture for our DHIS2 implementation .....	4
2.2 Develop and configure recommended central instance of DHIS2 system and project-level sites for phased implementation with relevant training resources .....	5
2.3 Provide system and user documentation; advise on appropriate restructuring of resources and data management processes and policies to achieve Pact’s objective.....	6
2.4 Support phased system implementation with key personnel in conjunction with Pact data team..	7
3. Proposal Submission .....	9
3.1 Proposal format .....	9
3.2. Proposal submission deadline.....	9
3.3. Submission method for proposals .....	9
3.4. RFP Questions .....	9
4. Evaluation of Proposals.....	10
4.1. Evaluation criteria .....	10
5. Terms and Conditions .....	11
5.1. Contract terms .....	11
5.2. Disclaimers .....	11

## 1. Background

A nonprofit international development organization founded in 1971, Pact works on the ground in nearly 40 countries to improve the lives of those who are challenged by poverty and marginalization. We strive for a world where all people are heard, capable and vibrant. One of Pact's strategic priorities is to become a more "data-driven" organization that uses data to inform business decisions and to maximize program impact for beneficiaries.

Our first step is to shift from our prior field data management system (DevResults) and move to DHIS2. We have already done sufficient system analysis to know DHIS2 is the correct tool for us; now we are posting this RFP to find a consultant/partner who can lead us as we define our DHIS2 architecture, migration, implementation and training plans. In this initial phase, we hope to achieve the following:

- Establish a global central DHIS2 instance, laying the foundation of metadata structures and conventions.
- Create sites for all performance reporting indicators for 40 active projects
- Set up one project as a "full-site" project, meaning that all local data collection tools are recreated in DHIS2 to capture all monitoring data
- Integrate the central instance with three existing country DHIS2 instances: Nigeria, Tanzania, and Zambia
- Provide technical specifications, system administrator manual, and end-user manual documentation
- Deliver four regional training workshops in Washington DC, Eastern Africa, Southern Africa and Asia
- Provide cloud-based hosting of a development, production, and training instance
- Ongoing support as needed

Specifically, the consultant will:

- 1) Review Pact's projects, processes and structure to design an appropriate information system architecture for DHIS2 and an implementation plan to meet Pact's objectives
  - a. Document global metadata
  - b. Collect geographic information for all Pact countries
  - c. Develop user profiles, roles, and groups
- 2) Develop and configure recommended central instance of DHIS2 system and project-level sites for phased implementation with relevant training resources
  - a. Global instance configuration for Pact's 12 standard Global Indicators
  - b. Configure active project performance reporting sites (approximately 40)
  - c. Configure one full site for one project
  - d. Integration with existing DHIS2 sites in Zambia, Nigeria, and Tanzania
  - e. Historic data migration

- 3) Provide system and user documentation; advise on appropriate restructuring of resources and data management processes and policies to achieve Pact’s objectives
  - a. End-user training curricula
  - b. Technical specifications
  - c. System administrator manual
  
- 4) Support phased system implementation with key personnel in conjunction with Pact data team
  - a. Deployment handover
  - b. Project management
  - c. Training
  - d. Recommended ad-hoc support

## 2. Scope of Work

### 2.1 Review Pact’s data management processes and structure to design an appropriate information system architecture for our DHIS2 implementation

Pact desires to expand beyond performance monitoring and donor reporting data to capture individual and site-level data. The data structure will capture indicators from a diversity of thematic areas (including, but not limited to) health, governance, capacity development, natural resource management, financial savings and lending groups, and markets.

The data structure must also aggregate across common indicators to present the global reach of Pact’s work. The consultant should also consider an appropriate plan for implementing the system across the organization. The following is a list of Pact’s impact areas, intervention level and the number of active projects.

Intervention Area	Intervention Level	Number of projects (they overlap)
Health – OVC, HTS	Community, Mobile Clinic	19
Livelihoods	Community	31
Governance	Community	31
Capacity Development	Organization, Village, Network	51
Natural Resource Management	Community, Village, Ecosystem Geographic Areas	13
Markets	Community, Village	22
<b>TOTAL NUMBER PROJECTS</b>		<b>71</b>

## **2.2 Develop and configure recommended central instance of DHIS2 system and project-level sites for phased implementation with relevant training resources**

Pact envisions the following system structure based on preliminary analysis and external consultation: a central DHIS2 instance that will house all country/project data and metadata. The central instance will be configured so that country programs have access and can only view their program requirements. Data entry will be direct into this instance and replace Excel and Access-based systems where appropriate. Global Indicators would be centrally reported, and project indicators would be designed to automatically report towards Global Indicators. The system should allow each country to customize their metadata to local needs and programs and support higher level coordination of data management between countries. This system functionality is a combination of existing DHIS2 functionality along with Pact-specific needs:

- 1) Data entry screens tailored for each project's data collection tools and indicators including default, section or custom forms
- 2) Ability to edit past data as needed. Administrators have ability to lock data entry forms so that data cannot be edited after a certain date.
- 3) Ability to revise a project's indicators (name, definition, calculation method, etc.)
- 4) Notes feature that allows staff to dialogue about indicator progress (e.g. comments can be provided per data value in data entry forms)
- 5) Automatic calculation of progress (i.e. annually, end-of-project, and achievement against targets)
- 6) Automatic and exportable trend graphs for project indicators inclusive of standard and customized data reports
- 7) Data export to Excel file formats
- 8) Downloadable Excel templates for local partners data entry and upload
- 9) Tracking of data entry and review process, with email notification
- 10) Notification system can be configured for completion of data entry forms and programs
- 11) Data entry audit feature
- 12) Access to indicator definitions, data sources, calculation methods, etc.
- 13) Ability to review and report on data aggregated beyond project level (country, region, globally) across multiple dimensions
- 14) Ability to add and revise Global Indicators via centralized portal for dispersion to all or select project sites
- 15) Access to data from all Pact projects in centralized resource with standard and customizable data visualization elements (dashboards, pivot tables, and charts)
- 16) Ability to create distinct user roles and access. Customized views based on user type (project staff, field manager, HQ Manager, System Administrator, etc.)
- 17) Offline data capture via computer, tablet and mobile (iOS, Android) devices
- 18) Ability to create virtual localized systems within one global system
- 19) Enhanced functionality through custom app design/development
- 20) GIS for visualization of data on maps
- 21) Exportable maps and charts to include in reports

- 22) Multiple data models: aggregate, events and tracker - handling individual and case management data alongside aggregate
- 23) Integration of existing projects and systems as well as setup of new projects into system should be considered to promote data archiving and scalability
- 24) Configurable user interface in multiple languages, if needed

### **2.3 Provide system and user documentation; advise on appropriate restructuring of resources and data management processes and policies to achieve Pact's objective**

While the implementation of DHIS2 system will be critical to collect, manage, and analyze data, organizational culture, policies, processes and resources play a significant role in the transformation of Pact to a 'data-driven' organization. Relevant and sufficient number of staff, training, institutional change management, and the positioning of the monitoring and evaluation team within the organization all play a part in creating a culture of data that will sustain an information system and make it useful over time. The consultant will be expected to provide advisory services to support action in the following key areas:

#### ***Appropriate staff level of effort***

Consultant will provide a recommendation for appropriate staffing and structure required to maintain, update, troubleshoot, and optimize the DHIS2 system. Recommendation should be informed by industry best practices, available internal resources, and 'data-driven' objectives. It is anticipated a central system administrator role will lead the management of the platform including user setup, configuration of new projects and data integrity maintenance. Advanced software development and coding will be handled externally on an as needed basis.

#### ***Institutional change management***

Planned institutional change management with intentionality is critical for new system deployments. Pact has established a steering committee made up of relevant internal stakeholder to define and guide the DHIS2 initiative. This committee is a mix of operational, regional, and M&E senior leadership. The consultant will work with the committee to develop a deployment plan inclusive of, i) a comprehensive communication plan that outlines why a new system is being deployed; ii) how the system will be rolled out; iii) how staff will interact and be supported in using the new system; and iv) criteria for how projects will be prioritized for inclusion in the new system.

#### ***M&E policy and processes***

For Pact to achieve its objectives, the role of monitoring and evaluation must be seen as a central technical area that functions as the focus of the management information system's design, management, and expansion and use of the data. The consultant will support Pact's DC-based Results and Measurement staff in development and refinement of relevant data policies and processes to ensure necessary frameworks are established to support the effective adoption of the DHIS2 system and integration of data into business operations.

## **2.4 Support phased system implementation with key personnel in conjunction with Pact data team**

Pact seeks to implement a global DHIS2 system through a phased approach that will both develop the central instance and appropriately integrate past, current and new projects. See deliverable list below for details. Pact has identified projects for initial integration or setup in the global DHIS2 system. Pact will work with the consultant to develop an implementation plan that will include, i) implementation timeline; ii) communication plan; iii) roles of key Pact personnel and consultant; iv) data strategy to ensure the successful adoption of the platform and system integration; and v) pertinent information for site configuration (tools, M&E plans, user roles, indicators, etc.). After system development and training by the consultant, the system implementation will be performed Pact's HQ and in-country M&E teams with support provided by the consultant.

It is expected the roll-out of the new DHIS2 system will be accompanied by global training and capacity building. Training will focus on both functional knowledge of the system as well system use tailored to the specific needs of the project. As a global organization Pact encourages the consultant to provide several regional trainings (in regional hubs for Pact programs such as Nairobi, Johannesburg, and/or Bangkok, and in Pact Headquarters in Washington, DC) and a training of trainers event to be able to provide capacity building for global staff. In addition to trainings, the consultant will be expected to develop documentation such as end-user and system administrator manuals, training videos, as well as technical documentation of the system, which should be made available to accompany ongoing training and capacity efforts.

A phased approach is encouraged for development and deployment based on appropriate dimensions (geographic, project lifecycle, thematic area, etc.). The suggested timeline of deliverables is found below.

<b>Project Deliverable Summary</b>	<b>Due date</b>
1. Start-up report including: <ul style="list-style-type: none"> <li>• Architecture/design</li> <li>• Global metadata</li> <li>• Implementation / Project plan / Gantt chart</li> <li>• Change management plan</li> <li>• Geographic information for all Pact countries</li> <li>• Recommended user profiles, roles, and groups</li> </ul>	June 30, 2018
2. Central instance with Global Indicators	August 31, 2018
3. Training package and implementation plan for Global Indicator data entry	August 31, 2018
4. 4. Pilot / set up of one project: Myanmar	September 30, 2018
5. Performance reporting set up in enterprise site for all Pact projects (40 projects, ~30 indicators each)	October 31, 2018
6. Training package and deployment plan for performance reporting on enterprise site for all Pact projects	October 31, 2018
7. Integration of three existing DHIS2 sites	November 30, 2018
8. Carry out four regional trainings on DHIS2 (DC, Nairobi, Johannesburg, Bangkok)	December 31, 2018
9. Provide technical specifications, system administrator manual, and end-user manual documentation	December 31, 2018
10. Set up 5 additional sites: <ul style="list-style-type: none"> <li>• Thailand and Zimbabwe due by Nov 30, 2018</li> <li>• Madagascar, Somalia and Swaziland due Jan 31 2019</li> </ul>	See dates to the left
11. Historic data migration from existing Excel and SQL data sources (Myanmar Shae Thot project, Nepal and Swaziland)	TBD

### 3. Proposal Submission

#### 3.1 Proposal format

Firms should submit proposals with five sections:

1. Technical Proposal: firm should provide narrative with development and implementation methodology, proposed system structure, technical requirements for deployment, and timeline to cover all functional areas, by task.
  - a. Page limit: 20 pages
2. Staffing List: information on the consultancy team, describing roles, profiles of consultants, participation level, and CVs.
3. Financial Proposal: should provide the total cost of the project and clearly detail project costs (such as hourly rate, materials needed, etc.). Cost estimates detailing scaled pricing dependent on number of prices and types of projects to be integrated/setup in system are encouraged. The financial proposal must be submitted in Excel.
4. Past Performance: firms will provide at least two examples of a type of work similar in scope to this request with justification of relevance.
5. References: firms must provide a minimum of three professional references for similar project work, along with contact phone number and email.

#### 3.2. Proposal submission deadline

Applications must be submitted per the timeline on the cover sheet. At Pact's discretion, any application received after the exact date and time specified for receipt may be considered ineligible for consideration.

#### 3.3. Submission method for proposals

Submit applications electronically per the guidelines on the cover sheet. Documents must be submitted in Microsoft Word, Excel or Adobe PDF.

#### 3.4. RFP Questions

Pact will accept questions on the RFP and current data systems from interested bidders per the guidelines on the cover page. Responses to submitted questions will be provided by Pact to all parties who express interest in the RFP.

## 4. Evaluation of Proposals

### 4.1. Evaluation criteria

Pact will use a “best value” method for selecting the most advantageous firm/individual consultant to provide these services. All proposals provided will be evaluated solely against the following criteria.

<b>Evaluation Criteria</b>
<p><b>I. Breadth and Depth of Experience (30%)</b></p> <p>Consultant should have long-term experience with database and user interface design and development. Expertise in DHIS2 development and implementation is required. Previous project work with global scale is required. Consultant should demonstrate, by references and work over time, stability and viability.</p> <p>Consultant should have, either on staff or demonstrably available as sub-contractors, key skills such as Functional/scope analysis, DHIS2 architecture design and deployment, UI/UX design, Testing/QA, Training, and Documentation</p>
<p><b>II. Work Approach (30%)</b></p> <p>Consultant should provide a clear methodology and timeline for development and implementation of the global DHIS2 system and its alignment to Pact’s ‘data-driven’ objective. Consult should have demonstrated ability to listen, respond, interact and then deliver solutions that meet not only the stated needs of the intended users but also the unstated. By taking the time to thoroughly consider all aspects of the desired functionality and organizational strategic vision, the consultant should be able to create an informed system and supporting structures to meet Pact’s needs.</p> <p>Consultant must be able to provide timely and ongoing updates to the internal project managers as well as manage/coordinate the development efforts of the development team. These skills are sometimes found in a single individual but could require someone to function as liaison and someone else as project manager.</p>
<p><b>III. Past Performance (20%)</b></p> <p>Firms should provide three references preferably from the NGO or nonprofit sector with a brief summary of each project, the outcome of each, and a contact person.</p>
<p><b>IV. Cost (20%)</b></p> <p>We anticipate the contract to be issued as time and materials and seek an estimated total cost quote from applicants. We understand that the system requirements and structure will be confirmed through the firm’s analysis, therefore firms may not be able to provide an exact total cost quote for the work. We do ask for as much detail as possible in your pricing including staff roles, hourly rate, hosting cost, a potential timeline or project plan and/or a low to high price range.</p>

## 5. Terms and Conditions

### 5.1. Contract terms

We anticipate the contract to be issued for this work to be Time and Materials based.

All deliverables provided to Pact must be furnished without royalty or any additional fees.

All materials developed during this project will be owned exclusively by Pact. Contractor will not use or allow the use of the materials for any purpose other than contractor's performance of the contract without the prior written consent of Pact.

### 5.2. Disclaimers

- Pact may cancel the solicitation and not award any funds.
- Pact may reject any or all proposals received.
- Issuance of solicitation does not constitute award commitment by Pact.
- Pact reserves the right to disqualify any proposal based on firm's failure to follow solicitation instructions.
- Pact will not compensate firms for their response to the solicitation.
- Pact may contact listed references without notice. Pact also reserves the right to contact other past performance information sources that the firm did not list in the application.