Malaria Consortium, Project Management Initiative, UK office
Request for Proposal (RFP) & Invitation for Tender to provide Projects and Results Software to manage, monitor and evaluate project and organisational outputs

SPECIFICATIONS AND INSTRUCTIONS TO BIDDERS

A. Malaria Consortium

Malaria Consortium is one of the world's leading non-profit organisations dedicated to the comprehensive control of malaria and other communicable diseases in Africa and Southeast Asia. Malaria Consortium works with communities, government and non-government agencies, academic institutions, and local and international organisations, to ensure good evidence supports delivery of effective services, providing technical support for monitoring and evaluation of programmes and activities for evidence-based decision-making and strategic planning.

Founded in 2003, Malaria Consortium is a rapidly growing organisation, currently operating in 16 countries in Asia and Africa with 9 country offices. We currently have approximately 450 staff running 44 projects, ranging from large-scale multi-country programmes focusing on net distribution, to community based projects training health workers to diagnose and treat malaria, diarrhoea and pneumonia, and targeted research projects into drug resistance.

The Head Office is in London, at Development House, 56-64, Leonard Street, London EC2A 4LT, UK, with the Africa Regional Office in Kampala, the Nigeria Regional Office in Abuja and the Asia Regional Office in Bangkok.

B. Administrative Information

1) It is the intent of this RFP to secure competitive proposals to select a supplier or vendor for Malaria Consortium to supply software that will handle project information, indicators, targets and results information. The software will be operated in all Malaria Consortium countries including but not limited to; UK, Nigeria, Uganda, Ethiopia, Mozambique, South Sudan, Burkina Faso, Thailand, Myanmar, Cambodia.

2) Bidder shall submit bids addressed to Alex Farrington, Project Management Specialist at Malaria Consortium via email: a.farrington@malariaconsortium.org

3) Bids must be received by **Tuesday 18th August at 5.00pm**. Bids submitted after this time will not be accepted.
4) The bidder shall ask for any review and clarifications that they may have on this request for proposal up to **Thursday 30th July at 5.00pm.**
5) Malaria Consortium shall respond to the bidder's clarifications on **Friday 31st July by 5.00pm**. A list of all submitted clarifications with responses will be sent to all bidders.

6) Malaria Consortium shall notify the winning bidder in writing within **14** working days of the bid closing. Malaria Consortium is under no responsibility to release the identity or contract terms of the winning bidder. 3 shortlisted bidders will be asked to present to Malaria Consortium the **week commencing 31st August,** details of which will be released to the 3 bidders the **week commencing 24th August.**

7) The submitted proposal must include the following information. Failure to supply all requested information or comply with the specified formats may disqualify the bidder from consideration.
    i. A full description of the proposed system, including a detailed explanation of how it meets the requirements of Malaria Consortium, and including details of I.T technical requirements.
    ii. A full description of the proposed training framework, user manual, and a technical manual including any specific IT training for troubleshooting that may arise. This will include the duration of the training and the number of areas/subject to cover. The bidder is required to submit a full training methodology, and deliver training to 15 initial users as part of the contract. Further training may be required, but will be contracted outside of this RFP if needed.
    iii. Indication of bidders remote support methodology, which includes developer troubleshooting, support services and software upgrading whenever there are new integrated features.
    iv. Provision of either an online demo or submit a link to a recorded demo that demonstrates the capabilities of existing software and/or demonstrate experience of similar systems and functionality in order to guide Malaria Consortium procurement review committee.
    v. Complete pricing schedule as per the price table below (Annex A), this should include tax and any given discount to Malaria Consortium.
    vi. Copy of business registration documents (proof of legal operation in their country of residence).
    vii. An indication of the project timeline, and a proposed completion date.

8) Malaria Consortium reserves the right to accept or reject any or all bids, and to accept the bid deemed to be in the best interest of Malaria Consortium, and is not bound to accept the lowest priced bid submitted.

9) Malaria Consortium reserves the right to award contracts to multiple vendors if deemed to be in its best interest.

10) The award criteria shall be based on the proposals overall value for money while taking into consideration donor and internal requirements and regulations. The award will be determined by the procurement review committee formed by Malaria Consortium employees.

11) All bid responses shall be reviewed and certified by Malaria Consortium in adherence to the disqualification rules set forth by our donors.

C Technical Requirements & Specifications

1) The software can be an off the shelf product, software as a service or a bespoke application, including excel and could be accessible via a web browser or through a desktop programme.
2) The bidder should provide evidence that they can meet Malaria Consortium's requirements. Evidence may take the form of previous systems the bidder has developed, or examples of past clients or other evidence that can be verified by Malaria Consortium.
3) The bidder should provide all the materials required by Malaria Consortium in the best quality and will be responsible to deliver the ordered goods/services to the final destination as specified on the Purchase Order or contract.
4) The bidder should specify in their bid whether or not they intend to subcontract any part of the work required under this RFP, and provide details on the part to be subcontracted and the agency to which the subcontract will be awarded.

D Qualifications

1) The bidder should submit, as part of the bid, a section describing the vendor's general qualifications to provide the services requested which should include information on length of operation, ownership, management, technical qualifications of staff and any other information the vendor feels will support their bid.
2) The vendor shall submit, as part of the bid, a minimum of two client references which will include a contact name, phone number and email address.

E Scoring Criteria

All bids will be primarily selected and scored against the below set of criteria; however, other relevant information provided by the bidder will be considered in the scoring process.

1) Price-bid represents good value for money, and the ability to offer a fixed price for the contract, which includes the system design and delivery, provision of a training methodology, licenses (if required), technical support and any scheduled maintenance for a 3 year period. Details must be provided about how support, maintenance and support costs are calculated, including any price increase calculations for future years.
2) Delivery terms- ability to deliver to a defined period, with majority of work with Malaria Consortium's Project Manager done before October 2015. The bidder can demonstrate the ability of their team to deliver the work.
3) Ability to design and deliver a database system that meet all essential requirements set out in the RFP

4) Credibility of the bidder, able to demonstrate past experience delivering similar systems

The three highest scoring bids will be shortlisted, and requested to provide a presentation in Malaria Consortium's London office, demonstrating examples of similar systems they have developed, and presenting their methodology to our Project Managers.

F Other Contract Terms & Conditions

1) The winning bidder will receive a Purchase Order/contract setting out the terms of the agreement.

2) The bidder will provide fixed prices for the contract term.

3) The bidder will state payment terms taking into account that Malaria Consortium's preference is to receive a monthly invoice or payment after delivery of goods within 30 days on credit terms.

4) All payments shall be made in Great British Pounds Sterling by bank transfer or by check.

5) The winning vendor shall warrant that a receipt confirmation would be provided by the recipient before Malaria Consortium can effect a payment for that particular delivery.

6) The language for communications and required documents is English.

Responding bidder: ____

Address: ____

Phone: ___________________________ E-mail:____________________

Name ______________________________ Title ____________________

I am authorised to represent the above-detailed bidder and to enter into business commitments on its behalf.

Signature ________________________

Date ___________________________

malaria consortium
disease control, better health

Problem statement

We have identified the need for a database that will enable us to find information about each of our projects, their indicators, targets and results. Without a centralised database, staff are finding the process of learning from and about other projects very time consuming, often having to email several people to find where the information they require (largely basic information about projects, and reports showing results) is saved. Similarly, our Business Development team regularly need access to information about existing projects that may inform new proposals, but have no easy way to access it.

This makes decision-making and management decisions difficult, and our global management group have no way of independently monitoring progress without making requests to staff.

We do not want to restrict our options in the future with a closed system that cannot grow with us, and require a database that can be adapted to meet our changing needs, or that has additional capability to our current requirements which we can utilise in time.

Use of the database

The primary users of the database will be internal project leads; staff responsible for managing projects, and the relationship with the donor/funder, who require the ability to register new projects and indicators, upload routine results data, access basic project information, and results information, usually on a quarterly basis.

Financial reporting is not required from the database, as we already use PS Financials to do this.

One of the primary uses of the database will be to aid these project leads in reporting to donors/funders, by providing them with quick and easy access to results data as a report output. These outputs can be included in narrative reports.

Another primary use will be for other staff members (especially those responsible for external communications) within Malaria Consortium to view information about projects which they do not have responsibility of, to aid new proposals, management decisions and to share learning across all our offices. For example, staff in Nigeria currently have no way of knowing about projects that operate in Cambodia, even if they are working on similar issues, and potentially even the same indicators. Therefore there is no way, apart from emailing the relevant project lead, to gain access to such information about other projects.

The database will be updated by project leads whenever a new project begins, and should require them to input a set of required data to register a new project. Project leads will then update results on a quarterly basis, or whenever required by the donor/funder, or whenever data needs to be amended. i.e. an indicator is changed with the agreement of a donor/funder.

When data is updated quarterly by the user, the data should be able to be collated and represented in progress reports. The database should allow users to access a set of standard reporting formats, as well as enabling customised reporting determined by the user. i.e generating new queries.

<u>Key requirements</u>

- ✓ To enable the registration and definition of new project and indicators.
- ✓ To capture details of all Malaria Consortium project, sub-projects and research projects.
- ✓ To capture indicators, targets and results data for each project, for every quarter.
- ✓ We use SharePoint Online as a Document Library, and folders containing additional project documents. i.e Logframes, project timelines, budgets, evidence tables are stored here. The database system must allow the user to click on a URL link for each project that takes them to the allocated SharePoint folder. User Groups and permissions on these SharePoint Online folders are currently setup to synchronise with our hosted Active Directory. This Active Directory is available to suppliers to assist with user and permission management.
- ✓ To add, group, filter and sort data in the required reporting formats.
- ✓ Enable aggregation of data where required for certain results.
- ✓ Visually (charts, tables) demonstrate progress of selected indicators at different levels (project, country, region, programme area, time).
- ✓ Support advanced querying of any indicator or a combination of indicators by any level of choice (project, country, region, programme area).
- ✓ To enable data entry for defined periods for each indicator actual.
- ✓ To be accessible in offline mode for users to input and save data, which can then be automatically uploaded when a connection is re-established.
- ✓ Use a low-bandwidth and be suitable for use in all Malaria Consortium operating countries.

- ✓ Be user friendly, taking into account the varying I.T capabilities within the organisation, and provide a visually appealing and simple to use data input and query form. All MC staff are familiar with using Microsoft Office and a Web Browser.
- ✓ Have different levels of user for each part of the system. The supplier will be able to access our Active Directory of all users and user permission groups if required.
- ✓ Predominantly use the English language, but projects and indicators may need to be recorded in French and Portuguese.
- ✓ Allow updates from multiple users simultaneously.
- ✓ Enable the export of data into excel and CSV formats for further analysis.
- ✓ Attractive front end data entry form, accessed via a webpage or a desktop programme.

Optional requirements

- ✓ Enable visual geographical reporting using GPS coordinates to show projects and results by geographical location on a map.
- ✓ Enable scheduled reporting that can be automatically emailed to defined staff.
- ✓ Enable the creation of routine reports specified by staff on an ad-hoc basis without development support.

DETAILED DATABASE SPECIFICATION

Section 1 contains a description of the users' perspective of the system, including required functionality and minimum requirements.

Section 2 contains a technical specification that will determine the design/functionality of a suitable solution.

1. General description

1.1. Users

3 levels of access are envisaged for each project:
Level 1- User can view data and generate standard reports and queries (approx. 200 users)
Level 2- User has access to front and back end of the system, and in addition to visitor access, will be able to change existing data, add new data, create new queries and create new reports (approx. 70 users)
Level 3- User has full administrative access to front and back end, and can support other users to navigate and use the system (approx. 3 users)
It is likely that the owner or member of one project will have visitor access to all other projects in the system. Active Directory groups are currently used to manage the SharePoint Online folders permission.

1.2. Current Infrastructure

Existing IT infrastructure includes SharePoint Online Intranet which contains a site for each project, with a mixture of Office 365 E2 and E3 non-profit licences, and a number of off-site hosted virtual servers.

Access to all Office 365 and hosted services is managed by a hosted Active Directory server with its own separate domain. We also have a hosted virtual server with SQL Server 2012 Standard, including Reporting Services. There is also a Windows web server with IIS. We are open to quotes based on using our existing infrastructure, as well as those that don't.

The Active Directory server – user logons and passwords, emails, security and distribution groups – can be made accessible to the application for user logon and access rights if appropriate.

Any additional requirements for infrastructure or external hosting will need to be explained and costed as part of the proposal.

It must be able to run on a low-bandwidth, taking into account the poor connectivity in many of our country offices. Low-bandwidth can mean as little as 0.25 Mbit/s for a user in some countries with satellite Internet connectivity.

1.3. Overview of functional requirements

The system will;

- ✓ Allow data to be input into the system including new project information, indicator/target/results data, quarterly reports/updates, and to change data (member and owner users only)
- ✓ Produce standardised reports, as per donor/partner requirements. Furthermore, it should set up automated reports for one or more project(s). With basic graphic representation of data. For example a report on all country projects and their results this quarter. It may be possible to use this to replace the normal quarterly reporting system.
- ✓ Provide the functionality that lets Malaria Consortium staff run queries on captured data and generate reports.
- ✓ Have version control and the ability to update basic information, targets or results whilst storing old information under a different version number.
- ✓ Produce reports and raw data in excel, CSV and SQL formats which we can use for further analysis and submission to the International Aid Transparency Initiative (IATI).
- ✓ Enable the display of quantitative and qualitative data.
- ✓ Link to Project Documents- Key documents e.g. contract, logframe, latest project plan will be accessible by linking to SharePoint Online- where Malaria Consortium stores its files.

2. Specific requirements

2.1. External Interface requirements

- Graphical User Interface
- Functionality (1)- Project Information(2.1.1)
- (2)- Project Indicators (2.1.2)

(3)- Reporting (2.1.3)

2.1.1. Project Information

There are multiple distinct sets of project data and associated reference data we require to be captured- all would need to be initially used to populate the system and updated, added or changed on an ongoing basis. At the beginning of a new project, the project lead would be required to input data into the system, ideally through a standard form or series of forms which includes all required information, and which can be accessed and updated at any time if needed.

Item to be captured		**Description**
Project		The main project, identified by MC project code
	Description	Short description of the project
	Start and end date	
	Total budget	Budget for the whole project including sub projects
	Country	A project could be spread across multiple countries
	Region	A project could be spread across multiple regions
	Project manager	Overall project manager
	Donor(s)	The person or organization funding the project. This list will need to be maintained separately as a single donor could fund multiple projects or one project could have more than one donor
	Partner(s)	A partner is another organisation who we might work with on a project. There could be more than one partner
	Prime recipient	The main recipient of the grant, which could be MC or a partner.

	Contractual requirements		Any output which we have agreed to in the contract. For example, need to share annual accounts every year. Split by month/quarter/year (whichever is most relevant). This will apply to all sub-projects and research studies
	Project category		Option to categorise projects. For example by technical area ICCM/ Diagnostics/etc. Should be possible to use these categories in reporting
	List of indicators		Individual project indicators used to measure achievement. Targets will be assigned to each indicator. Actuals will be recorded against each target
	Link to project documentation		Each project has a site in SharePoint online. The system will need to provide a link to this site
	…		Other information to be confirmed
	Sub-Project		A project/programme may have sub projects. For example the PPA Programme is made up of 15 projects which will be listed in the system as sub-projects.
		Description	Short description of the sub-project
		Start and end date	
		Total budget	Budget for the sub-project
		Country and region	Could be multiple values as above
		Sub-project manager	Sub-project manager
		Sub-project category	
		List of indicators	Individual sub-project indicators with their targets
	Research Study		A research study within a project – for example an ICCM project might contain a situational analysis and this will be listed. Where a research study is not attached to a project, it will be

			listed as the project itself.
		Description	Short study description
		Start and end date	
		Total budget	Budget for the research study
		Country and region	Could be multiple values as above
		Study manager	Research study manager
		Study category	Option to categorise research study e.g. qualitative/ quantitative, longitudinal /cross sectional
		List of indicators	Research study indicators with their targets. These will almost always be the core research indicators common to all research studies

All the data that is captured should be compatible with the IATI standards for organisations and activities so that it can be easily exportable in those formats.

2.1.2. Project Indicators

As included above, each project we implement has a set of indicators, against which we set targets, and record results.

Indicators can be either centrally managed core indicators that can apply to any project in Malaria Consortium, or indicators which are specific to the individual project, sub-project or research study. A mixture of both can be set up within any project, and a project is not required to use all core indicators, only those that are relevant to your project indicators. Research studies will mainly use core indicators, as they do not normally have their own. There should still be the option for research studies to add their own indicators.

When an indicator is associated with a project or study, it will be assigned a target which will be at the monthly, quarterly or yearly level as agreed with the donor.

Indicators will mostly be numeric, but there will also be a need for more qualitative indicators. Research studies will need a field to provide qualitative updates on activities or milestones, as they will not have regular quantitative data to record in the system. This is because the main output of research studies is a publication that details the study's findings, which is not produced until the end of the study.

Every month/quarter/year (depending on the indicator), the project lead will need to be able to record an actual result against the indicator for that project or research study. They may also need to record the source of the actual result that they are recording

2.1.2.1 Indicator examples

Some indicators are quite simple, such as the number of malaria nets distributed, where a simple numeric target and actual can be used.

The target can be a low or high threshold. For example if the indicator is the malaria cases per country, then the success of the indicator will be measured by how low it gets towards or below the target.

Indicators can be measured in percentages or ratios such as the proportion of people that have seen or heard a malaria message in the last 6 months.

Some indicators have more complex targets. For example the target might be to establish 2 frameworks in each of 6 states plus a further 1 framework in each of 3 further states. In this case targets would need to be entered as text.

Indicators can be cumulative totals over many periods or absolute values for the period. So the distribution of malaria nets could be measured either by looking at the number distributed in the period, or the total distributed over the course of the whole project so far.

A qualitative indicator might be to record whether or not appropriate meetings are taking place regularly. An example of a target might be "NMEP and SMEP branches heads, partner's forum and sub-committees meeting taking place regularly at NMCP and 9 programme states". It is likely that the result achieved would need to be stored as both text and some indication of whether the target was met to be able to quantitatively analyse results.

There will also be the need to have an indicator store two related targets. So it is often required to record the number of artemisinin-based combination therapies (ACTs) and malaria rapid diagnostic tests (RDTs) together as one indicator but with separate targets for each. Another example is to be able to set targets and record results for primary and secondary heath care facilities against the same indicator.
Some indicators will need a baseline recorded against them. So in the example of malaria cases per country the baseline would be the number before the project began.

2.1.3. Reporting

The system will need to provide reports displaying results of selected projects, specifically indicators, common indicators, by variables including date, donor, country, project lead, timeframe, contractual partners and category, in table, charts and formats. The transition from the project data entry to the reporting system should be as seamless as possible.

We would like to start off with some general reports which can be defined at the start of the project. However we would like the system to make it as easy as possible for further reports to be added in the future based on feedback from staff.

Some of the more common reports we anticipate the system providing are;

(1) Quarterly report for entire organisation based on common indicators

Purpose: to allow Global Leadership Group to monitor organisational progress against common indicators to aid decision-making.

(2) Quarterly progress report per project/sub-project/research project

Purpose: to monitor individual project progress against targets which can be used to populate donor reports, and that will help us flag risks and enable project managers to take appropriate action.

(3) Annual report data

Purpose: to provide a combination of quarterly progress reports, against project and common indicators.

(4) Query results report

Purpose: to add, group, filter and sort results by indicator, project, date, and country/region.

For example, search query to compare project results by country, based on common indicators.

2.1.3.1 Report formats

The reports should be available as charts or graphs, and tables, grids where appropriate. The report data should be exportable in a common format such as Excel, PDF or CSV. It should also be possible to save a report as an image or document file in order to be able to print out or use in presentations to donors or MC staff. Additionally, we would need a mechanism allowing us to pull data out of the system in order to produce our own ad-hoc reports and analyses within Excel or another platform of our choice. We would also like to be able to schedule reports so that certain users can be emailed relevant data on a regular basis, but this is not a key requirement.

Annex A- Price Table

QTY	ITEM DESCRIPTION	PRICE	% Discounted
1	Phase 1; System requirements and design		
2	Phase 2; System development and implementation		
3	Phase 3; Training for 15 staff members, including any associated costs, to take place in London.		
4	Phase 4; Annual Support, upgrades and technical support for 3 year period		
5	Total one-off cost		
6	Total annual on-going cost		