

# ***Request for Proposals:***

## ***Management Team & Fiscal Sponsor to serve as Program Management Unit, supporting the Interagency Supply Chain Group and Funders' Forum between 2023-2025***

Issued by the Interim PMU team on behalf of the Interagency Supply Chain Group and the  
Funders' Forum

Proposal Deadline:

**March 31, 2023**

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## Acronyms

Fiscal Sponsor	FS
Full-Time Equivalent	FTE
Funders' Forum	FF
Interagency Supply Chain Group	ISG
Interagency Supply Chain Group Steering Committee	ISG-SC
Low- and Middle-Income Countries	LMICs
Management Team	MT
Procurement and Supply Chain Management	PSM
Program Management Unit	PMU
Sustainable Development Goals	SDGs
Universal Health Coverage	UHC

## Purpose

The purpose of this RFP document is to solicit proposals for a **Program Management Unit (PMU)** to support the **Interagency Supply Chain Group (ISG)** and the **Funders' Forum (FF)**, two of the major global health procurement and supply chain management coordinating bodies. The new Program Management Unit shall provide fiscal sponsorship and project management services beginning June 2023 through the end of 2025.

In general, the role of the new PMU is to provide strategic leadership, project management, fiscal stewardship, and general administrative support. The PMU will consist of a **Fiscal Sponsor (FS)** and a **Management Team (MT)**. Proposals will be accepted from organizations that can provide either or both services. This document provides an overview of the coordinating bodies along with the expected roles and responsibilities for both the Fiscal Sponsor and Management Team. The requirements, process, and timeline for proposal submission are also included.

## Background

Ongoing access to affordable quality medicines and supplies is critical in achieving target global health outcomes, universal health coverage (UHC), and the Sustainable Development Goals (SDGs) in low and middle-income countries (LMICs). In these countries, health systems are often underfunded and lack the necessary infrastructure and resources to ensure consistent access to essential medicines, vaccines, and medical supplies. Challenges including weak infrastructure, lack of funding, limited capacity, and poor data quality, often lead to stockouts and other disruptions in the supply of health commodities which can negatively impact health outcomes. Efficient and effective supply chains are “the backbone” to ensuring quality health commodities reach those who need them, when and where they need/want them. The supply chain encompasses the entire process from the manufacturer to the end-user, including procurement, storage, transportation, and distribution. In recent years, and in part due to the COVID-19 pandemic, there has been an increased appreciation for the value of investing in strong public health procurement and supply chain management (PSM) systems. Funding for PSM reflects this increased appreciation; for example, in 2015, global health donors and NGOs were spending an estimated \$6B annually on health commodities in LMICs,<sup>1</sup> and many donor agencies have recently recommitted and/or enhanced their PSM investments (e.g., USAID recently committed ~\$17B to PSM in LMICs over the next ten years<sup>2</sup>).

While there have been many efforts to coordinate PSM activities in global health, and progress has been made, there are still many challenges including:

1. siloed donor and disease-specific investments and lack of visibility across stakeholders often create fragmentation and duplication of efforts,
2. weak or non-existent transition planning away from development aid limits sustainability, capacity development, and market creation, and
3. lack of alignment around shared strategies and priorities across stakeholders results in inefficient use of resources, duplication, and missed opportunities to advance the field and maximize impact.

In 2022, representatives from global donors and UN agencies carried out an exercise to review and improve global collaboration across the PSM ecosystem. Their intent was to leverage the current coordination mechanisms and move from a focus on ad-hoc activities to a more cohesive model of linking short-term activities and medium-term strategies to a long-term vision in order to better address ecosystem-wide challenges and strengthen the contributions of global PSM stakeholders. A new structure and model for collaboration were developed for both the ISG and Funders’ Forum. The leadership of the ISG and FF are now seeking a neutral (not one of the ISG or Funders’ Forum organizations to prevent undue influence) program management unit to support their efforts under the new model of global PSM collaboration, including managing and executing the various priorities of both coordination groups and fostering alignment across groups to maximize their collective impact.

### About the Interagency Supply Chain Group (ISG)

The Interagency Supply Chain Group (ISG) is a global collaboration forum established to support country-level health supply chain improvement efforts. In its previous form, the ISG was comprised of 16 global agencies that were actively involved in supporting supply chain efforts across disease areas. These activities included but were not limited to:

1. cross-agency coordination,
2. promoting policies, standards, and best practices to improve health supply chains such as GSI standards, and
3. developing shared tools and strategies such as defining priority key performance indicators (KPIs) for health supply chains.

For further background on previous ISG members and activities, visit [www.isghealth.org/members](http://www.isghealth.org/members).

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<sup>1</sup> Rosen, D et, al. *An Initial Estimation of the Size of Health Commodity Markets in LMICs*. Center for Global Development., December 2017.

<sup>2</sup> Ainsworth, David. *What we know so far about USAID’s \$17B NextGen Contracts*. Devex, January 2022.

## About the Funders' Forum (FF)

The Funders' Forum (FF) was established as a setting for major PSM funders to coordinate their investments and align around shared strategies. Thus far, the group consists of a subset of the ISG and has met informally with the intention of expanding participation in the coming months. Though this group's formation is relatively new, examples of past FF activities include:

1. exchanging input on individual donor agency strategies and investment priorities,
2. developing a shared list of priority Supply Chain Key Performance Indicators (KPIs) used by funders, and
3. refreshing the shared Target Software Standards for procurement and supply chain health information systems in support of country-led vendor contracting.

## A New Model for Global Collaboration

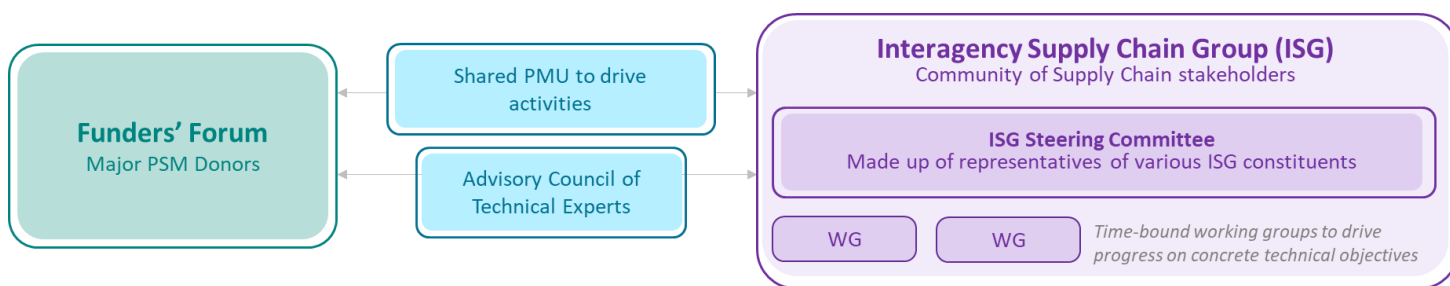
As a result of the 2022 review to strengthen global PSM collaboration, decisions were made to modify the roles and structures of both the ISG and FF. Under the new model, the ISG and FF will be officially linked through a shared PMU; both groups will continue to coordinate across all disease areas with the ISG focused on the medium-term time horizon (up to 7 years) and the FF on a longer-term time horizon (up to ~20 years).

The revised purpose of the ISG is to align the global PSM community around operational strategies and best practices for impact and to advocate for increased support for PSM activities. While the ISG previously was limited to donors and UN agencies, it is transitioning to an open community model that seeks to support and engage the broader global health PSM community (including governments, academia, NGOs, and the private sector). It will be governed by a steering committee (ISG-SC), receive support from the shared PMU and Advisory Council, and will commission working groups to carry out priority initiatives.

The FF will remain a closed forum focused on aligning PSM funders' high-level strategies, investments, and donor transition roadmaps for long-term impact. The FF will also focus on advocating to global leaders to elevate the prioritization of PSM. Like the ISG, the FF will leverage working groups to advance their priorities and will rely on a robust and capable shared PMU to drive progress throughout the year.

## Governance Structure Overview

The following new governance structure has been agreed to by the ISG Steering Committee (ISG-SC) and FF.



**Main Purpose**

1. Develops shared long-term vision and plan for sustainability and transitions
2. Engages and advocates to global leadership to elevate and advance PSM priorities
3. Aligns investment strategies

**Main Purpose**

1. Informs and operationalizes long-term PSM vision
2. Facilitates information exchange to align strategies across PSM stakeholders and coordination bodies
3. Promotes widespread adoption of global standards and best practices for technical excellence
4. Advocates for the improvement of PSM systems through resource mobilization and by influencing agency leadership

## Scope and Approach

In this section, more details are provided about the objectives and responsibilities of both the Management Team (MT) and the Fiscal Sponsor (FS), which together make up the Program Management Unit (PMU). Applicants may choose to submit a proposal to provide both Management Team and Fiscal Sponsor services if suitably qualified or submit a proposal for only one of the two service areas.

The following objectives and responsibilities provide an initial overview of expectations for the PMU. The structure and capabilities of the PMU will need to remain flexible to accommodate the evolving needs of the ISG and FF. In addition to responding to the outline provided, feel free to include additional recommendations as you see fit.

### High-level Objectives

The MT and FS provide the necessary structure and staffing for facilitating the execution of the complex, multi-organization, multi-stakeholder program. The MT will drive coordination, work plans, and deliverable development for the entire program and be responsible for the engagement and outreach to the broader global health PSM community. The FS will manage the funds initially provided by a single donor (the Bill and Melinda Gates Foundation) and later by multiple donors as well as work closely with the MT to achieve identified priorities by supporting the sub-contracting of staff, facilitating travel, disbursing grants, etc.

### Management Team Responsibilities

At a minimum, the MT will be responsible for the following key activities:

1. **Operationalizing the New Model of Global PSM Coordination:** Given the ongoing transition of the ISG and FF to reflect the model defined in the 2022 review, the new MT will be responsible for facilitating the establishment and formalization of the new roles, direction, and sustainability of the FF and ISG.
  - Establish the PMU and its associated processes and procedures.
  - Provide leadership for the ISG and FF as they transition to the new model of collaboration including managing a transition work plan, onboarding new stakeholders, and formalizing the governance and structural procedures of the new model.
  - Develop a 2-3-year operational plan to support the ongoing transition and define long-term objectives and funding needs under the new model.
2. **Providing Strategic Leadership:** The ISG and FF will rely on the MT to drive the strategy development, programming, and implementation of the ISG and FF efforts.
  - Lead the FF and ISG through long, medium, and short-term priority setting and co-defining of objectives and approaches based on input solicited and received from the broader PSM community.
  - Develop and manage a work plan for the ISG-SC, FF, Advisory Council, and ad-hoc initiatives.
  - Triage requests and ideas for new priorities, provide initial recommendations, and facilitate decision-making among the ISG-SC and/or FF.
3. **Project Management:** The MT will be expected to lead, coordinate, and facilitate the activities and convenings associated with the ISG and FF.
  - Drive timebound initiatives (4-8 per year):
    - Work with the Steering Committee to define key initiatives for the year to respond to PSM community needs and in line with the priorities for the ISG (see examples later in this document).
    - Manage the trajectory of the initiative toward its defined goals. In many cases, a technical expert will be contracted to lead initiatives with oversight and project management support from the MT. In other instances, the MT may facilitate strategy sessions with PSM community members, synthesize results, and develop recommendations.
    - Manage ad-hoc working groups: Some initiatives may require a working group – a body of PSM ecosystem members who are tasked with a discrete objective and deliverable. The MT will be responsible for managing the working group in partnership with a technical expert as needed.

Technical experts may be recommended by the Steering Committee and contracted through the FS, but managed by the MT.

- Host meetings for the Funders Forum and ISG-SC (estimated 4-6 times a year for each group), some of which will be virtual and others in-person:
    - Schedule, prepare, facilitate, and document each meeting.
    - Provide periodic reporting on performance against work plans.
    - Onboard new members as necessary.
  - Strategically leverage the Advisory Council:
    - Identify (in partnership with the Steering Committee) and manage a small group of PSM experts that provide advice on major priorities and decisions to the ISG-SC, FF, and ad hoc working groups.
    - Schedule, prepare, facilitate, and document each meeting.
    - Onboard new members as necessary.
4. **Communications and Advocacy:** Drive communications and advocacy efforts in support of the ISG and FF goals and the activities described above.
- Maintain strong and regular communications with key constituents (e.g., Steering Committee, Advisory Council, etc.).
  - Develop a communications strategy for engaging the broader PSM community (implementing partners, disease-specific coordination groups, country stakeholders, etc.) to disseminate information, collect inputs, and facilitate conversations (in-person and virtual).
  - Manage a high-level advocacy strategy and coordinate work across channels and stakeholders to achieve advocacy outcomes (e.g., adoption of best practices, elevating PSM on global agendas, etc.).

## Fiscal Sponsor Responsibilities

At a minimum, the Fiscal Sponsor will be responsible for the following key activities:

### 1. Maintain tax-exempt status:

- Receive and acknowledge charitable contributions from multiple sources.
- Comply with all legal requirements of a charitable organization (the equivalent of a 501(c)3 status in the United States).

### 2. Manage fees and funds:

- Retain control and discretion over funds.
- Fulfill oversight responsibilities over funds.

### 3. Partner with PMU on operations to enable ISG and FF activities:

- Support MT in developing budgets to match the work plans.
- Identify resource gaps and needs in advance of their necessity.
- Dispense grants/contracts globally.
- Provide administrative support to PMU staff including hiring and compensation of staff and consultants, accounting, and legal services to PMU.
- Provide and manage the contracting for the Management Team (if the Management Team organization is a separate entity from the Fiscal Sponsor organization) and additional service providers as determined by the ISG-SC and FF.

# Eligibility and Application Process

## Management Team Eligibility Requirements

1. Must be geographically located in or near (within 3 time zones of) the Central European Time zone with the ability and willingness to travel globally.
2. Must have experience managing multi-stakeholder initiatives.
3. Can be either a for-profit or not-for-profit entity.
4. To protect the ISG and the FF from conflict of interest, and ensure neutrality, organizations who currently do, or may, in the near future receive funding for global health procurement and supply chain services (including technical assistance) may be ineligible to serve as the Management Team. What classifies as global health procurement and supply chain services, and the amount of funding that constitutes a material influence will be handled on a case-by-case basis.

## Fiscal Sponsor Eligibility Requirements

1. Must be a nonprofit.
2. Must be able to hire and provide benefits to staff globally.
3. Must be able to receive funding from a variety of organizations (both profit and not-for-profit).
4. Must be able to manage funds in USD and EUR.

Note: The contracting for the Fiscal Sponsor will be carried out by the Bill and Melinda Gates Foundation on behalf of the ISG and Funders' Forum. If a separate organization is hired to serve as the Management Team, the MT will be contracted by the Fiscal Sponsor.

## Evaluation and Selection Criteria

Applicants should submit proposals for the Program Management Unit as a whole or for one of the two functions of the PMU (Fiscal Sponsor or Management Team). Proposals should include: 1) General Proposal, (2) a supporting budget or fee structure, and (3) a statement of conflict of interest (see Appendix 2).

In soliciting a proposal, consideration will be given to organizations that meet the eligibility criteria and demonstrate the ability to **fulfill the requirements of the role(s) as described above**. Applicants will be assessed based on:

- **Organizational Capabilities** to carry out the responsibilities outlined above for the management team or the fiscal sponsor, including but not limited to years of experience supporting multi-stakeholder initiatives.
- **Relevant Experience** performing similar work as described in this RFP.
- **Structure and Approach** to the project implementation, including the composition and relevance of the proposed team, considerations for flexibility and adaptability of the approach, and innovation.
- **Value for money** based on the total proposed cost and value provided as described in the proposal.

Special consideration will be given to applicants who have:

- Availability to start on June 1.
- Demonstrated consideration for Diversity, Equity, and Inclusion in the proposed approach and team structure.
- Experience working with or in low- and middle-income countries.
- Experience in global development and/or public health and/or procurement and supply chain.
- Demonstrated consideration for how your organization can help the ISG and FF contribute to positive health impact.



## Application Process Timeline

RFP Announced	March 8, 2023
Deadline for submitting questions to <a href="mailto:proposals@isghealth.org">proposals@isghealth.org</a>	March 16, 2023 at 17:00 CET
Responses to frequently asked questions released	March 21, 2023
Deadline for submitting Proposal	March 31, 2023 at 17:00 CET
Finalists notified and Interviews conducted	April and May
Target Start Date	June 1, 2023

## Conflict of Interest

In an effort to create a neutral platform for cross-agency collaboration for major PSM funders and leaders, we are seeking a PMU team that is unbiased and not already associated with specific PSM stakeholders. Additionally, PMU organizations may gain access to confidential information regarding PSM funder strategies and plans; to prevent a conflict of interest, PMU organizations may be considered ineligible to bid for future PSM work commissioned by these funders (this is at the discretion of each funder).

As part of the applicant proposal, organizations are required to describe any known conflicts of interest. Please leverage the guidance provided and describe any real or perceived conflicts of interest (Appendix 2). While conflicts of interest will be determined on a case-by-case basis, organizations that currently do, or may in the near future, receive significant funding for global health procurement and supply chain services (including technical assistance) may be disqualified from consideration. Funding for other global health initiatives will not disqualify an applicant.

## How to Submit a Proposal

To apply, please submit a proposal by emailing the following to [proposals@isghealth.org](mailto:proposals@isghealth.org).

Please submit each of the documents below in separate PDF forms. Other attachments will not be reviewed.

1. **General Proposal** (up to 5 pages) that describes the following:
  - **Organizational background:** Describe briefly how your organization is uniquely qualified to serve as the Fiscal Sponsor and/or Management Team for the FF and ISG. Please include an overview of your organization, legal status, examples of relevant work (including two references with contact information), and years of experience relevant to the responsibilities outlined above.
  - **Proposed Structure and Approach:** Describe your approach and how it meets the requirements listed in this RFP including team structure, resources, and capabilities.
  - **Staff Experience and Bios:** Provide an overview of the staff that will be supporting this project and describe how that team is uniquely qualified or capable of achieving the intended outcomes and deliverables.
  - **Other:** Describe (1) how you foresee your approach supporting the ISG and the FF contribution to positive health impact, and (2) how your approach incorporates best practices in diversity, equity, and inclusion.
2. **Budget or Fee Structure:** Please include a high-level budget or description of your fee structure to complete the work described. Note that expenses (travel, contracting of technical experts, etc.) do not need to be included.
3. **Conflict of Interest Statement:** Leveraging the guidance in Appendix 2, please provide a conflict of interest statement describing any past, current, or future potential conflicts.

The duration of the contract to support the PMU is for 2.5 years beginning June 2023 through December 2025 with a possibility for extension. Please indicate your available start date (pending contracting processes).

## Appendix 1: More details on the ISG and Funders' Forum

### Participation

**The Interagency Supply Chain Group:** The ISG is focused on aligning and mobilizing the procurement and supply chain management community around a unified shared vision and strategy for advancing PSM systems. ISG at-large community is made up of voluntary individual and organizational participants in the ISG; note that there is no formal membership, but rather ISG community events and communications will be open to anybody working in the PSM ecosystem. The ISG Steering Committee is the governing body representing the ISG. The **ISG Steering Committee** membership is still being formalized and will be a priority for the new PMU to develop a transparent and representative process for selecting future ISG-SC participants.

**Funders' Forum:** The FF is a closed group of representatives of the major global public health funders. The group currently has seven (informal) members and will likely expand to ~10-15 in the coming year.

**Working Groups:** Working group membership varies with the objectives of the working group. Working groups are designed to be time-bound and deliverable-driven as opposed to standing working bodies. The MT is responsible for ensuring they have a relevant leader and for coordinating the selection of participants with input from the FF and ISG-SC. The FS is responsible for contracting working group leaders and managing other working group expenses as needed.

**Advisory Council:** The Advisory Council is a closed group of independent PSM experts that provide advice and recommendations to the ISG-SC and FF (and the PMU). The selection, cadence of meetings, and governance of the Advisory Council have yet to be established. The new PMU will be asked to make recommendations and provide support to establish the Advisory Council and then will leverage the Advisory Council, once formed, to support strategy development.

### Decision-Making Process for the ISG Steering Committee and Funders' Forum

**ISG Steering Committee (ISG-SC):** The Steering Committee will make all major decisions for the ISG and will leverage recommendations from the Advisory Council and PMU. It is expected that major milestone decisions and priority-setting for the PMU will be determined by the ISG-SC, while day-to-day management will be left to the PMU. The ISG-SC employs a consensus-based decision-making process, and on occasion looks for a vote. In the case of a vote, each organization on the ISG-SC has one vote, so if one organization has more than one person participating in ISG-SC decision-making, they will designate one individual responsible for the organizational vote.

**Funders' Forum:** The FF will make all major decisions for the FF while day-to-day management of technical initiatives and administration will be left to the PMU. The FF will work collaboratively with the PMU to address barriers to deliverables and align with the ISG activities. The FF also employs a consensus-based decision-making process, and on occasion looks for a vote. Like the ISG-SC, each organization on the FF has one vote only.

### Examples of Initiatives

The MT will oversee and lead the various initiatives as they arise based on the priorities set by the ISG-SC and FF. Working groups may be formed as needed to deliver on the objectives of the initiative. Below are a few examples of what that work might entail:

1. Design and execute an advocacy strategy for a designated topic in PSM.
2. Facilitate and manage the creation of a shared strategy for the digital transformation of supply chains in LMICs.
3. Develop a long-term roadmap in support of local manufacturing including mapping current funder priorities, targets, gaps, capacity-building strategies, etc.

## Sample Calendar of Major Events led by the PMU – Illustrative, Non-exhaustive

Areas of Active Involvement	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Steering Committee	• Special session for annual strategy setting	█										
	• Mid-year progress review						█					
	• Budget + Operations review meetings (sub-committee members only)				█					█		
Advisory Council	• Special session for annual strategy setting (w/SteerCo)	█										
	• Mid-year progress review (w/SteerCo)						█					
Working Groups	• Launch per directions from SteerCo on membership, outputs, etc.		█									
	• Monthly meetings for duration of project/mandate including asynchronous work on deliverables			█	█	█	█	█	█	█	█	█
PSM Community	• ISG side-meeting (~1-2 hours) at existing events (e.g., GHSCS, HLA, Indaba, etc)						█				█	█
	• Year-end consultations (e.g., survey) on priorities for next year										█	█
Project Management Unit (PMU)	• Facilitate, coordinate, and socialize all of the activities described above + coordinate with key SC groups; compile and send monthly communications/ progress updates											

## Appendix 2: Conflict of Interest Categories

Please indicate in your proposal, which conflict of interest category is applicable to your organization and provide a description of any actual, potential, or perceived conflicts of interest.

### NO CONFLICT OF INTEREST

Your organization has no actual, potential, or perceived conflict of interest in relation to this procurement process and undertakes to carry out its duties with the highest degree of objectivity and integrity.

### CONFLICT OF INTEREST

**Actual:** This is an existing conflict of interest, for example, your organization has an existing contract for global health procurement or supply chain services that constitute/constituted a significant portion of your annual global health budget last year.

**Potential:** This is a conflict of interest that is about to happen or could happen, for example, your organization is in the process of being hired by, or acquiring part or full ownership of a firm that has submitted a bid/proposal that could constitute a conflict of interest.

**Perceived:** This is a conflict of interest that might be reasonably perceived by others as compromising your organization's objectivity, for example, you have a contract in a procurement and supply chain adjacent activity.