



TERMS OF REFERENCE

*Title of Assignment: **Development of Global Training Strategy and Programme for the Next Generation Stock Management Tool***

UNICEF Supply Division is currently developing and planning the global implementation of the Next Generation Stock Management Tool (Next Gen SMT) for management of vaccines, including COVID-19 vaccines, and related supplies by national immunization programmes. A large component of the implementation plan is the training of users in a large number of countries and UNICEF is seeking to engage a service provider to develop a comprehensive global training strategy for the Next Gen SMT and to develop training programme to support the implementation of the training strategy in relevant countries.

1. BACKGROUND

- 1.1 UNICEF procured supplies and services worth 4.468 billion in 2020, including 1.9 billion doses of vaccines (worth \$1.413 billion) for 102 countries. Also, for more than a decade, UNICEF and WHO have been supporting countries to drive immunization programme impact through technical support and capacity building for immunization supply chain monitoring and data use. UNICEF utilizes this expertise as a partner in the COVAX Facility, where UNICEF plays key roles in delivering COVID-19 vaccines to the COVAX Participants and in providing technical assistance and tools to support countries manage their vaccines.
- 1.2 Imbalances in vaccine stock and wastage negatively impact a country's immunization services. To support countries manage these aspects, WHO developed the 2006 WHO guidelines on vaccine stock management, accompanied by a set of MS Excel-based tools.¹ One of these tools was the Stock Management Tool (SMT), which is intended to support countries better manage their vaccine and other immunization supplies.
- 1.3 The MS Excel-based SMT contains information on various vaccine management areas, distributed across 26 tabs. The tool is mainly implemented in National Vaccine Stores and used by Store Managers and Expanded Programme for Immunization (EPI) teams. The SMT is a very comprehensive tool and allows the user to perform their responsibilities within the following supply chain functions:
 - Stock management
 - Cold chain inventory
 - Temperature monitoring
 - Storage capacity management

¹ <http://apps.who.int/iris/handle/10665/69629?locale=en&locale=en&mode=full>

- Distribution management
- Forecasting and demand planning

In addition, the SMT provides an overview of immunization supply chain performance through visual display of key performance indicators.

- 1.4 The MS Excel-based SMT is currently used in over 40 countries in Africa. Despite the popularity of the tool and the broad use by trained MOH personnel, the SMT is becoming outdated. It has functional limitations since it relies on manual data capturing processes and, as it is a MS Excel-based tool, it is prone to errors and disrupted formulas. These limitations combined with the opportunity to leverage newer technologies led to UNICEF and WHO upgrading from the current MS Excel-based tool to the Next Generation SMT, a web-based application.
- 1.5 The Next Generation SMT Project was established in 2019 and is a collaboration between UNICEF Supply Division, UNICEF Programme Division, UNICEF Regional Offices and WHO. The project team consists of experts within supply chain, immunization and information technology and includes the developers of the MS Excel-based SMT. The Monitoring, Strategic Data and Evidence Unit (MSDEU) in UNICEF Supply Division leads the implementation of the project and contract.
- 1.6 The Next Gen SMT is expected to be used in countries already using the MS Excel-based SMT, but other countries without the technical or financial capacity to deploy more advanced electronic stock management or logistics management information systems (LMIS) technology are also expected to be interested in using the new version of the SMT. The mix of Next Gen SMT countries will therefore change to these two groups of users: 1) current MS Excel SMT user countries and 2) new countries to SMT.
- 1.7 The Next Gen SMT covers the MS Excel SMT functional requirements and additional requirements such as automated stock transfers and increased visibility on stock data. These enhancements to the SMT imply that the learning needs include how to use the new SMT technology but also the new functional requirements in the Next Gen SMT.
- 1.8 Next Gen SMT will be used at different supply chain levels in the countries, from the national warehouse to district level stores. There are five different user profiles in Next Gen SMT, some country users will have more than one role, for example Store Operator and Country Admin roles. Since Next Gen SMT will be used at different levels and by users with different roles, then the possible number of learners within each country can range from a few to hundreds, depending on the types of stores where SMT will be introduced.
- 1.9 With the implementation of the Next Gen SMT, the existing MS Excel-based SMT will have to be rolled back. The duration of co-existence of the two tools and the approach to take the MS Excel-version out of use is beyond the scope of this assignment.

2 OBJECTIVES

2.1 The assignment includes the following objectives:

- Understand the current use of the MS Excel-based SMT through a desk review and targeted interviews with key stakeholders and SMT users. This is expected to guide the identification of capacity gaps and needs of each target audience
- Develop a training programme and identify appropriate training approaches and implementation options. Pilot the training programme and different approaches (e.g. in-person, blended, live online, self-paced) in 3 countries
- Based on the learnings from the pilot, develop a global training strategy, a comprehensive training programme (i.e. learning objectives, sessions, exercises, etc.) and implementation plans appropriate to suit the different learners and contexts

3 DESCRIPTION OF ASSIGNMENT

3.1 The assignment will be implemented in following three phases:

- Inception Phase
- Training Programme and Strategy Development Phase
- Finalization Phase

Inception Phase

3.2 The inception phase includes obtaining the required knowledge of the current and Next Gen SMT including the current use in countries, as well as the planning and agreement on the approach for the implementation of the assignment.

3.3 The knowledge gathering will be done through a desk review of relevant programme documents, interviews with key stakeholders and, where possible, current SMT users in countries, and an extensive introduction to and demonstrations of the Next Generation SMT through online sessions with the Supply Division team. The expectation is that there will be no more than 15 key informant interviews in addition to the interaction with the MSDEU team to understand the use of SMT in details. No travel will be included in the contract, but the service provider is free to use online options or existing partnerships to access in-country stakeholders or SMT users as seen appropriate and possible.

3.4 A kick-off meeting (or sessions) will be arranged with the service provider and the key stakeholders in UNICEF and WHO to provide inputs to the service provider's understanding of the SMT project and agreement on the approach to the implementation of this assignment. The meeting will be online.

- 3.5 The inception report will include a description of the current use of SMT to illustrate the service provider's understanding of the key audience, number of learners per country, learning requirements, learning contexts, and similar. The report should also include a detailed description of the approach including roles and responsibilities for implementation of each project phase and a work plan. The report should be maximum 15 pages and be accompanied with a PowerPoint presentation.

Training Programme and Strategy Development Phase

- 3.6 This phase includes the following three areas:

- Development of the training programme
- Piloting the training programme
- Development of a global training strategy

Development of the training programme

- 3.7 The training programme will be developed in phases. First, a rapid prototype with the core content will be developed to test different learning approaches during the pilot and define what works best. Secondly and based on the learnings from the pilot, the programme will be updated.
- 3.8 Given the comprehensive nature of the Next Gen SMT, the training will also have to be comprehensive and appropriate for the different types of user roles. The training programme will be used in multiple countries and within each country from national to district level store operators, which may have different learning capacities and styles. In the development of the training, it is important that the available training platforms are considered as well as grouping the different audiences to reduce the number of modules or required trainings. Where possible adaptability of all or specific modules should be considered.
- 3.9 For the final training programme, the service provider will develop an organic training programme with well-defined, measurable objectives by audience, opportunities for practice, etc. and that is based on adult-learning methodologies. The programme should include specific trainings for different supply chain levels, training of trainers, and super SMT user.
- 3.10 The content and format of each module could include practical exercises, country level videos and relevant scenarios, online modules, or similar. It is important that the final training modules include clear indication of which user profiles will need to take which training module. The appropriate training duration is to be determined by the service provider, but for estimation purposes should be maximum the equivalent of 2 days face-to-face training.

- 3.11 The final training programme should also include designed handouts and other material required for the implementation of the training and material required for the post-training support according to the training strategy. All material should be in a ready-to-use version.
- 3.12 The final training programme must be available in French and English. UNICEF will cover the translation costs, but the service provider is responsible for 1) providing the material in an appropriate format for translation, 2) proof-reading and 3) submission of full training programmes in French and English.

Piloting the training programme

- 3.13 UNICEF will identify 3 countries that will be part of the pilot, they will all be in Africa and consist of Anglophone and Francophone countries. The pilot design can be the same in all pilot countries or the service provider can decide to pilot different training implementation approaches (face-to-face, remote or a combination) to guide decision on the most appropriate option(s) in the final strategy. The pilot can take up to 8 weeks, timeline to be determined by the pilot design.
- 3.14 Based on the piloting, the service provider is expected to understand the possible training methodologies, learning requirements per user role/audience, key learning barriers and opportunities, language requirements and other relevant information. If the piloting does not give all the required information, then the service provider is free to implement a survey or introduce additional key informant interviews, as they see fit.
- 3.15 In the pilot design, the service provider can plan to facilitate the initial trainings, but it is important that the pilots include trainings by the intended facilitators so the appropriateness of the training programme can be properly assessed. In each pilot country, a subset of store managers can be trained, depending on the pilot design. The learning team can plan to remotely (or through a partner in country) supervise the implementation of the trainings within a country. The pilot should also include the post-training support function.

Development of global training strategy with supporting implementation plans and tools

- 3.16 Given the current situation, the suggested strategy must be possible to implement during and after the COVID-19 pandemic. Sustainability is essential and, thus, the implementation method cannot rely on heavy involvement from the global and regional UNICEF and WHO offices.
- 3.17 To further support the sustainability, the strategy also needs to include a description of the post-training support to learners. This will be key in ensuring the users continue to be able to use the Next Gen SMT. Innovative approaches are welcome to provide this support. The solution has to be sustainable and consider the limited number of UNICEF

and WHO staff who can be consistently involved in providing support with the introduction of SMT and continued support to country SMT users.

- 3.18 The global training strategy document must be reader-friendly and concise in its written form. As a minimum the strategy should include: 1) design concept of the learning programme, including learning objectives for each type of SMT user, curriculum, training methodology, delivery methods, technologies, opportunity to practice, interactivities, etc., and 2) description of how to address language barriers, lack of internet availability, travel restrictions, differences in base knowledge between new and current users of SMT, and among users within a country.
- 3.19 To support the training implementation, the service provider will develop country training implementation plans and tools to be used by countries, and global training implementation plans and tools that will highlight the role of the global and regional SMT support staff. The plans should, if according to training strategy, include different options for different types of countries presented in an easy-to-understand way so countries can select the appropriate implementation approach for their context.

Finalization Phase

- 3.20 The service provider will present to the SMT project stakeholders to receive inputs to the proposed training strategy and programme. The strategy and training programme will be finalized based on the inputs from this meeting. The meeting will be online. If, at this time, it is assessed to be advantageous to meet in person, the meeting may be proposed to be face-to-face and UNICEF will cover the costs of travel for the key members of the learning team.

4 INDICATIVE TIMELINE

- 4.1 The development of the Next Gen SMT is ongoing, and the soft launch is planned for mid-August 2021, which will mark the start of the pilot. The implementation plan is under development and the training component is an essential part of this plan.
- 4.2 The implementation of the assignment is expected to take place over a period of 6 months (estimated July to December) with the following indicative timelines:
- Inception phase: up to 3 weeks
 - Development of training programme: up to 4 weeks
 - Designing and implementation of training pilot: up to 8 weeks
 - Development of global training strategy: up to 2 weeks
 - Finalization Phase: up to 4 weeks

5 KEY DELIVERABLES

5.1 Here is a summary of the deliverables. Details on each are included in the Description of Assignment section.

- **Deliverable 1: Inception Report**
- **Deliverable 2: Training Programme Prototype for the pilot (in French and English)**
- **Deliverable 3: Training Report from the pilot**
- **Deliverable 4: Global Training Strategy**
- **Deliverable 5: Training Implementation Plans and Tools**
- **Deliverable 6: Final Training Programme and Material (in French and English)**

6 PAYMENT SCHEDULE

Deliverable 1: 10% of contract amount

Deliverable 2: 20% of contract amount

Deliverable 3, 4 and 5: 40% of contract amount

Deliverable 6: 30% of contract amount

7 REPORTING AND RESPONSIBILITIES

7.1 The tasks under this assignment will be implemented under the supervision of the Monitoring, Strategic Data and Evidence Unit (MSDEU) at UNICEF Supply Division. Weekly updates to MSDEU on the progress of implementation will be required. The team will officially report to the Monitoring Specialist, MSDEU, UNICEF Supply Division, based in Copenhagen.

7.2 UNICEF will ensure that the team has all the conditions to implement the assignment and receive feedback from the project group. UNICEF will:

- Provide SMT documentation package containing examples of Excel-SMT, 2019 Excel-SMT assessment, access to and a demo of the Next Generation SMT, and the Next Generation SMT User Guide
- The confirmed pilot countries at the start of the contract and continued facilitation of communication with the UNICEF Country Offices in these countries to support the pilot implementation
- Facilitate contacts with internal and external interviewees
- Organize online kick-off meeting in the Inception Phase and an online finalization meeting. If additional meetings are required with project stakeholders during the implementation of the assignment, then UNICEF will arrange these meetings. If the

global situation allows, and it is agreed to, then UNICEF will cover the costs of key members to travel to Copenhagen for a face-to-face meeting.

8 QUALIFICATION REQUIREMENTS

8.1 The team allocated to this project by the service provider should have the minimum combined qualifications listed below:

- Advanced university degree in human resources, educational sciences, public health, management, supply chain, social sciences or other relevant areas or first university degree with relevant experience;
- Experience with development of comprehensive training strategies for multiple countries and a large number of learners in each country, including experience with adult learning and innovative implementation strategies;
- At least 7 years of experience with development of training programme and implementation of large training strategies, preferably within health, immunization supply chain, deployment of technology and in developing country context;
- Experience with development of educational training videos or other relevant training formats is preferred;
- Excellent skills in organizing, communicating, reporting and presenting;
- Working knowledge of the UN, UNICEF and/or WHO, NGO experience is preferred;
- Direct experience and/or knowledge with Excel-SMT is an asset;
- Fluency in written and spoken English and French are essential, fluency in Arabic, Russian and/or Portuguese is an advantage;
- Presence or partnerships in Excel-SMT user countries is an advantage.

ANNEX B1: ASSESSMENT OF PROPOSALS

1. This work will be delivered under a service provider contract. The Proposer achieving the highest combined technical and financial score will (subject to any negotiations and the various other rights of UNICEF detailed in this RFPs) be awarded the contract. The Proposer must meet the minimum qualifications listed above. Technical and financial proposals must be presented separately, and will be assessed on the basis of 70% technical and 30% financial.

Technical

2. The total amount of points allocated for the technical component is 70. UNICEF scorers will read the submission and give scores according to the evaluation criteria included in the table below. Only bidders that obtain **49** points and above in the technical assessment will be considered for the stage of financial assessment.

3. The following items should be included in the Technical Proposal, based on which the first assessment will be conducted (indicative length of each section is provided in brackets):

- 1) Profile and experience with similar projects and clients, including links to 2 relevant sample training strategies and programme (up to 2 pages)
- 2) Understanding of the ToR and overall approach to this assignment including innovative and appropriate description of possible end products (up to 5 pages)
- 3) Methodology to implement the three phases of the assignment, special focus should be on the phased development of training programme and the pilot design (up to 6 pages)
- 4) Proposed workplan for assignment (up to 3 pages)
- 5) Quality assurance and risk mitigation mechanisms to guarantee the best results for the project (1 page)
- 6) Describe the structure of the proposed team for this project, including who would be the focal point for the assignment. Team member profiles, including summary of qualifications (referring to the qualifications specified in point 8.1 above) and number of working days allocated to the project per consultant (up to 5 pages)
- 7) Reference contacts from other clients (1 page)
- 8) Annexes: full CV(s) of professional(s) conducting the Assessment

4. If needed, UNICEF may request bidders to conduct a presentation of their proposals and clarify details before making a final decision on contract award.

Financial

5. Bidders that obtain a minimum score of 49 (out of 70) in the technical assessment will move to the next phase (opening of financial proposals). The total amount of points allocated for the financial component is 30.

6. Bidders **should submit the Financial Proposal Form (Annex C)** and should provide an all-inclusive amount proposal, with cost breakdown by resources and activities. The following cost items should be included and described in detail in the financial proposal:

- 1) Daily rates for the team member(s) (hour rates and total cost per professional, based on number of working days included in the technical proposal)
- 2) Other fees
- 3) Additional costs
- 4) Do not include travel costs in the proposal (see point 7 below)

7. In the case travel is required either in case of implementation of any of the pilot training approaches suggested or for meetings with the project team in Copenhagen, the costs will be reimbursed by UNICEF upon proof of travel costs. UNICEF will reimburse economy flight tickets and pay DSA according to official UN DSA rates (<https://icsc.un.org>). The number of people, travel plans, duration, etc. has to be previously agreed with UNICEF.

Technical Proposal Evaluation Form		Max. Points Obtainable
1	Experience in similar projects – 15 marks	
<i>In brief: Evidence of experience with similar projects</i>		
1.1.	Evidence of experience in similar projects of similar scale and level: 2 sample training strategies and programmes	15
2	Proposed methodology and approach – 40 marks	
<i>In brief: Approach, methodology and workplan for the assignment</i>		
2.1.	Overall understanding of the ToR and of the needs and requirements for the assignment including innovative and appropriate description of possible end products	15
2.2.	Proposed methodology to implement each phase of the assignment	10
2.3.	Workplan for the assignment	10
2.4.	Quality assurance and risk mitigation mechanisms	5
3	Quality of personnel and suitability for the assignment – 15 marks	
<i>In brief: Consultant's profile and evidence of knowledge, skills & experience</i>		
3.1	Academic and technical background of consultant(s)	5
3.2	Experience in similar work of developing global training strategy and training programme	10
	Total – 70 marks	70