REQUEST FOR BIDS

Contract type: Agreement for Performance of Work (APW)
Issue Date: 5th of March 2014
Closing Date / Time: 30th of March 2014 23:59 GMT

Request for Bids: “Case study” teaching materials demonstrating the use of systems thinking tools and approaches in health systems of low- and middle-income countries

1. Background

The Alliance for Health Policy and Systems Research invites proposals for the development of case study teaching materials that demonstrate the application of system thinking tools and approaches in answering health systems questions in low- and middle-income countries.

The Alliance for Health Policy and Systems Research (HPSR), thereafter called the Alliance, is an international collaboration, based within WHO Geneva, that aims to promote the generation and use of health policy and systems research as a means to improve health systems in LMICs. For more information please visit: http://www.who.int/alliance-hpsr/en/.

The Alliance has vigorously advocated for the use of systems thinking in guiding investments in health systems since the publication of its 2009 flagship report, “Systems Thinking for Health Systems Strengthening” http://www.who.int/alliance-hpsr/resources/flagshipreports/en/index1.html. The interest generated by this report led the Alliance to take the lead in the publication of a well-received Journal Supplement on “Systems thinking for health systems strengthening in LMICs: Seizing the opportunity.” in Health Policy and Planning in October 2012.

Building on its interest and expertise, as well as the potential to develop research-capacity in this area, the Alliance is leading the preparation of a second Journal Supplement entitled “Advancing the application of systems thinking in health”, with financial support from IDRC. Fourteen applications of systems thinking tools and approaches in LMICs have been selected for inclusion in this special issue of BMC Health Policy Research and Systems, to be launched at the Third Global Symposium on Health Systems Research, in Cape Town, South Africa in October 2014.

2. Objective of the work

The goal of this work is to develop case study teaching materials that demonstrate the application of systems thinking tools and approaches in health policy and systems research, particularly in low- and middle income countries, therefore facilitating the development of research capacity in this area. The materials produced should be developed to be used readily by the developer’s institution and by others. The target audience may be either instructors of post graduate programmes who would directly utilize them in training students on a particular systems thinking tool or approach or individual students interested to deepen their understanding of the applications of various tools, i.e., as self-taught materials. In other words, they should serve as a ‘how to’ materials on the application of the particular approach, employing the case study materials as a means to explain the approach and how it can be used in practical terms.

The teaching materials should be based on one or more case studies presenting a particular systems thinking
tool or approach. Examples of tools or approaches that may be considered are developing causal or influence loop diagrams, conducting social network analysis, systems dynamics modeling, agent based modelling, etc. Bidders are welcome to propose developing teaching materials for more than one tool or approach related to systems thinking or complex adaptive systems methods and theories under the following two restrictions a) at least one case study (if more than one is used in the teaching materials) must build on one of the papers selected for the upcoming special issue to be published in BMC Health Policy Research and Systems (see Table 1 for the topics and approaches used in these papers), and b) each package of case study teaching materials (if more than one package is proposed) should focus on one or two linked approaches. The aim is to use the materials to explain in-depth how an approach can be used.

Interested Bidders will be provided access to the abstracts of the fourteen papers on request and those selected for the work will be provided access to the full manuscript and author contacts for the relevant paper to their proposed area of focus. Bidders will be expected to work with the paper authors and the responsible Staff of the Alliance for Health Policy and Systems Research in developing the teaching materials. Bidders should be aware that all materials produced as a result of this work will become the property of WHO and will be made freely available and disseminated through the Alliance website and other channels.

<table>
<thead>
<tr>
<th>Paper Title</th>
<th>Systems Thinking tools and approaches</th>
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<tr>
<td>1 Why cure crowds out prevention: A systems dynamics model</td>
<td>System dynamics computer simulation model</td>
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<td>2 Realist evaluation of the Leadership Development Programme for district manager decision-making in Ghana</td>
<td>Realist evaluation, Causal loop diagram</td>
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<td>3 Advice seeking behaviour among Primary Health Care physicians in Pakistan</td>
<td>Social network analysis</td>
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<td>4 Understanding the medical assistant role within primary care systems in the US and Romania: A systems dynamics approach</td>
<td>Systems dynamics modelling; Causal loop diagram</td>
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<td>5 Exploring dual practice and its management in Kampala, Uganda</td>
<td>Multiple case study design with embedded units of analysis; causal loop diagram illustrating interactions and feedback.</td>
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<td>6 South African examples of a leadership of sensemaking for PHC</td>
<td>Drawing on complex adaptive systems theory and policy implementation, considers both how health system actors’ sensemaking and exercise of discretionary power work together in challenging PHC re-orientation, and offer examples of leadership practices of sensemaking for PHC.</td>
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<td>7 Provider payment and service supply incentives in the Ghana National Health Insurance Scheme: A systems approach</td>
<td>Causal loop diagram to develop a qualitative explanatory model of supply incentives and behaviour.</td>
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<td>8 Stakeholder network influence on systems thinking towards sustainability</td>
<td>Stakeholder network analysis and Sustainability analysis process</td>
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<td>9 A realist evaluation of a capacity building programme for district managers</td>
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<td>10 Managing Rural China Health System Development in Complex and Dynamic Contexts</td>
<td>observations of policy process , identification of “transition points” analysis of how changes and modifications occurred using a CAS framework</td>
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<td>11 From design order to complex order: Understanding the dynamics of the Seguro Polular policy adopted in Mexico using a complex adaptive systems model</td>
<td>Analysis of actors objectives roles power and policy responses, CLDs and analysis of associated CAS phenomena that evoked the policy change</td>
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<td>12 Understanding the dynamics of neonatal mortality in Uganda</td>
<td>Dynamic synthesis methodology, causal loop diagrams with a validation approach to test it</td>
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### Table

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<td>13 Understanding the rowing complexity governing immunization services in</td>
<td>Complex adaptive system framework; Causal loop diagram</td>
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<td>Kerala, India</td>
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<td>14 Sustainability evaluation as learning and sense-making in a complex urban</td>
<td>Sustainability Framework method, based on six iterative steps: system mapping, vision setting,</td>
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<td>health system in northern Bangladesh</td>
<td>articulating critical components, measurement definition, setting an assessment plan, executing the</td>
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<td>plan, and continuous stakeholder engagement in analysis and decision making.</td>
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3. **Deliverables**

A package of case study teaching materials covering one or more systems thinking approaches.

Bidders are free to suggest pedagogical techniques and methods that they deem suitable to be used as case study teaching materials. However, they should keep in mind that the materials include the following information:

1. **Learning objectives**
2. **Target audience**
3. Detail each activity that would be carried out to demonstrate the approach including:
   - The type of activity and all the materials necessary to conduct it
   - What the activity will achieve and how it is related to the learning objectives
   - How the activity will be carried out and how the participants will be engaged
   - As relevant, how conversation will be steered to encourage focused debate and discussion
   - Suggested questions or exercises to assess individual learning to ensure that important points are addressed and well understood
   - Key learnings expected from that activity

4. **Provide a list of relevant background reading materials and teaching and training materials required**
5. **Evaluation form to assess individual skills acquired and competence in the application of the particular systems thinking approach as well as usefulness of the teaching materials**

For example, activities to demonstrate realistic evaluation may start with a group discussion on participants’ understanding of the concept, guided by the instructor incorporating the learning from background readings on ideas such as complex causality and the importance of context. The group may then proceed to apply the approach learnt to the case study at hand, through the use of flip-charts, presentations, debates and discussions. Individual learning may be assessed through, for example, a written paper or a presentation to the group applying the approach to another case study. The example above is purely illustrative and not indicative of any preference for either the systems thinking approach or pedagogical technique that authors may choose to employ.

4. **Requirements/Competencies**

Bidders for this contract should meet the following criteria:

- Have demonstrated experience in systems thinking, e.g., as one of the bidder’s current teaching areas or through prior publications in this field
- Have the ability to communicate scientific information pedagogically to a varied audience (bidders have the possibility to include and work with a specialist in the development of teaching materials in the bid—in which case short bio will also be required)
- Be linked to a teaching institution offering courses in health systems research or related field where these materials will be tested and used
5. Activity timeline and Budget

A first draft of the materials will be due by 15th September 2014 with the final version due on 15th February 2015. Between the first and final draft, the successful bidder(s) should test and refine the materials by using it to support their teaching in this field in their institutions or elsewhere. The Alliance will review the materials by sending them to experts in the field and may also test them researcher training workshops/seminars held by Alliance or other partners. Feedback and suggestions for improvement will be shared with the successful bidder(s) to be incorporated in the final version. The budget will be contingent on the scope of the proposed teaching materials. A bidder may propose more than one case study teaching materials using an itemized budget for each tool or approach involved, although we expect most proposals to cover one tool or approach. The Alliance may contract more than one bidder to cover a wider range of tools and approaches. The payments will be linked to satisfactory completion of the deliverables.

6. Instructions to Bidders

6.1 Format and content of the application

Applications for this work should be in the form of a proposal of not more than 5 pages that should include the following:

a) Motivation for applying: how this work fits into the bidder’s academic background and current position

b) Relevant Background: Brief description of previous work in the field of systems thinking, both research and teaching, with references if possible.

c) Description of the case study teaching materials proposed to be prepared, including:
• The particular systems thinking approach or approaches that will be used
• Target audience
• A description of the pedagogical technique/s proposed (if planning to use more than one systems thinking approach, please specify pedagogical technique corresponding to each approach) and how it is supposed to be used (face to face teaching; online, etc)
• The case studies (from the supplement issue or elsewhere) that the bidder proposes to use to illustrate these approaches (subject to the condition mentioned in the objectives section)
• How the materials will be used to train students and researchers in the systems thinking approach addressed, including the course it is proposed to be used in and instructors who will be utilizing the materials

d) Short institutional profile/s and profiles of anticipated team members, including the main bidder, this should include information on collaborators, if any

e) Estimated and itemized budget summary.

f) Contact details of the bidder including email and telephone number.

6.2 Joint Proposal

Two or more entities may form a consortium and submit a joint proposal offering to jointly undertake the work. Such a proposal must be submitted in the name of one member of the consortium - hereinafter the “project leader”. The lead organization will be responsible for undertaking all negotiations and discussions with, and will be the main point of contact for, WHO. The lead organization and each member of the consortium will be jointly and severally responsible for the proper performance of the contract.

6.3 Communications during the Call Period

A prospective bidder requiring any clarification on technical, contractual or commercial matters may notify WHO via email at the following address no later than 3 working days prior to the closing date for the submission of offers.
Email for submissions of all queries: alliancehpsr@who.int
(use subject: WHO Bid Ref. systems thinking teaching materials)

The Alliance team at WHO will respond in writing (via email only) to any request for clarification of the call that it receives by the deadline indicated above. Questions are to be submitted by e-mail to the above address.

A consolidated document of the WHO’s response to all questions (including an explanation of the query but without identifying the source of enquiry) will be posted on the internet site where the bid itself is posted.

There shall be no individual presentation by or meeting with bidders until after the closing date. From the date of issue of this call to the final selection, contact with WHO officials concerning the call process shall not be permitted, other than through the submission of queries and/or through a possible presentation or meeting called for by WHO, in accordance with the terms of this call.

6.4 Period of Validity of Proposals

The offer outlined in the proposal must be valid for a minimum period of 120 calendar days after the closing date. A proposal valid for a shorter period may be rejected by WHO. In exceptional circumstances, WHO may solicit the bidder’s consent to an extension of the period of validity. The request and the responses thereto shall be made in writing. Any bidder granting such an extension will not, however, be permitted to otherwise modify its proposal.

6.5 Closing Date for Submission of Proposals

Proposals must be received at WHO at the e-mail address alliancehpsr@who.int (use subject: WHO Bid Ref. systems thinking teaching materials) no later than 30th of March 2014, (23:59 GMT).

WHO may, at its own discretion, extend this closing date for the submission of proposals by notifying all bidders thereof in writing. Any proposal received by WHO after the closing date for submission of proposals may be rejected.

6.6 Amendment of the Call

WHO may, at any time before the closing date, for any reason, whether on its own initiative or in response to a clarification requested by a (prospective) bidder, modify the call by written amendment. Amendments could, inter alia, include modification of the project scope or requirements, the project timeline expectations and/or extension of the closing date for submission.

All prospective bidders that have submitted a proposal with regard to the call will be notified in writing of all amendments to the call and will, where applicable, be invited to amend their proposal accordingly.

6.7 Clarification of Proposals

WHO may, at its discretion, ask any bidder for clarification of any part of its proposal. The request for clarification and the response shall be in writing. No change in price or substance of the proposal shall be sought, offered or permitted during this exchange.

7. Award of Contracts

7.1 Award Criteria

Contracts shall be awarded based on a combination of criteria including the bidder’s motivation statement, research and teaching experience and the proposal in terms of innovativeness of pedagogical techniques, clarity, and range of systems thinking approaches addressed.

However, WHO reserves the right to:
a) Award the contract to a bidder of its choice, even if its bid is not the lowest;

b) Award separate contracts for parts of the work, components or items, to one or more bidders of its choice, even if their bids are not the lowest;

c) Accept or reject any proposal, and to annul the solicitation process and reject all proposals at any time prior to award of contract, without thereby incurring any liability to the affected bidder or bidders and without any obligation to inform the affected bidder or bidders of the grounds for WHO’s action;

d) Award the contract on the basis of the Organization’s particular objectives to a bidder whose proposal is considered to be the most responsive to the needs of the Organization and the activity concerned;

e) Not award any contract at all

WHO has the right to eliminate bids for technical or other reasons throughout the evaluation/selection process. WHO shall not in any way be obligated to reveal, or discuss with any bidder, how a proposal was assessed, or to provide any other information relative to the evaluation/selection process or to state the reasons for elimination to any bidder.

NOTE: WHO is acting in good faith by issuing this call. However, this document does not obligate WHO to contract for the performance of any work, nor for the supply of any products or services.

7.2 WHO’s Right to enter into Negotiations

WHO reserves the right to enter into negotiations with one or more bidders of its choice, including but not limited to negotiation of the terms of the proposal(s), the price quoted in such proposal(s) and/or the deletion of certain parts of the work, components or items called for under this call.

7.3 Signing of the Contract

Within 30 days of receipt of the contract, the successful bidder shall sign and date the contract and return it to WHO according to the instructions provided at that time. If the bidder does not accept the contract terms without changes, then WHO has the right not to proceed with the selected bidder and instead contract with another bidder of its choice.

Please apply by email only to alliancehpsr@who.int (use subject: WHO Bid Ref. systems thinking teaching materials)

Closing date 30th of March, 2014 (23:59 GMT)

Only the successful bidder(s) will be contacted