



April 10, 2023

Request for Proposals # **RFP03333**  
**GHSC-PSM EDI SERVICES**

Dear Sir or Madam,

Chemonics International Inc. (hereinafter referred to as “Chemonics”), under the **Global Health Supply Chain Program – Procurement and Supply Management (GHSC-PSM) project**, USAID Contract No. AID-OAA-I-15-00004 is issuing an Indefinite Quantity Subcontract (IQS) Request for Proposals (IQS RFP) for the **provision of EDI Services**. The attached IQS RFP contains all the necessary information for interested Vendors.

Chemonics implements the USAID funded Global Health Supply Chain Program – Procurement and Supply Management (GHSC-PSM) project. Chemonics is issuing this RFP to identify and evaluate third party solutions for electronic data interchange (EDI) between the GHSC-PSM eco-system and its health commodity suppliers to enhance operational efficiency and supply chain visibility through the electronic exchange of data.

Companies or organizations should indicate their interest in submitting a proposal for the anticipated subcontract by sending an email indicating their intention to **Bob Keating, TO1 Integrated Supply Chain Manager** at [RFP\\_EDI\\_Services@ghsc-psm.org](mailto:RFP_EDI_Services@ghsc-psm.org) by **13:00 on April 30, 2023**.

Following this RFP, Chemonics anticipates awarding an Indefinite Quantity Subcontract (IQS) and may issue accompanying TOs. During implementation of the work solicited in this RFP, the IQS instrument will serve as the governing subcontract for the work and relationship between the contractor and subcontractor, while the TOs instruments will be used by the contractor to order work from the subcontractor as needed, within the parameters of the IQS. Only IQS holders may bid on TOs under the IQS.

Chemonics intends to offer an overview of Chemonics’ ecosystem and the services solicited through this RFP to interested vendors on April 18, 2023. If necessary, Chemonics will provide answers to all relevant questions received in an amendment that will be **emailed by [RFP\\_EDI\\_Services@ghsc-psm.org](mailto:RFP_EDI_Services@ghsc-psm.org) by April 26, 2023**.

This IQS RFP does not obligate Chemonics to execute a subcontract, nor does it commit Chemonics to pay any costs incurred in the preparation and submission of the proposals. Furthermore, Chemonics reserves the right to reject any and all offers, if such action is in the best interest of Chemonics.

Sincerely,

**Bob Keating**

Integrated Supply Chain Manager – Task Order I HIV/AIDS

Contractor for **USAID Global Health Supply Chain Program**  
**Procurement and Supply Management**

## Request for Proposals

IQS RFP # **RFP03333**

For the provision of

### **Third-Party EDI Services**

Contracting Entity:

#### **Chemonics International**

1275 New Jersey Avenue SE, Suite 200  
Washington, DC 20003-5115  
United States

Funded by:

United States Agency for International Development (USAID)

Funded under:

**USAID Global Health Supply Chain Program**  
**Procurement and Supply Management**

Prime Contract Number AID-OAA-I-15-00004

#### **\*\*\*\*\* ETHICAL AND BUSINESS CONDUCT REQUIREMENTS \*\*\*\*\***

Chemonics is committed to integrity in procurement, and only selects suppliers based on objective business criteria such as price and technical merit. Chemonics expects suppliers to comply with our Standards of Business Conduct, available at <https://www.chemonics.com/our-approach/standards-business-conduct/>.

Chemonics does not tolerate fraud, collusion among Vendors, falsified proposals/bids, bribery, or kickbacks. Any firm or individual violating these standards will be disqualified from this procurement, barred from future procurement opportunities, and may be reported to both USAID and the Office of the Inspector General.

Employees and agents of Chemonics are strictly prohibited from asking for or accepting any money, fee, commission, credit, gift, gratuity, object of value or compensation from current or potential vendors or suppliers in exchange for or as a reward for business. Employees and agents engaging in this conduct are subject to termination and will be reported to USAID and the Office of the Inspector General. In addition, Chemonics will inform USAID and the Office of the Inspector General of any supplier offers of money, fee, commission, credit, gift, gratuity, object of value or compensation to obtain business.

Vendors responding to this IQS RFP must include the following as part of the proposal submission:

- Disclose any close, familial, or financial relationships with Chemonics or project staff. For example, if a Vendor's cousin is employed by the project, the Vendor must state this.
- Disclose any family or financial relationship with other Vendors submitting proposals. For example, if the Vendor's father owns a company that is submitting another proposal, the Vendor must state this.
- Certify that the prices in the offer have been arrived at independently, without any consultation, communication, or agreement with any other Vendor or competitor for the purpose of restricting competition.
- Certify that all information in the proposal and all supporting documentation are authentic and accurate.
- Certify understanding and agreement to Chemonics' prohibitions against fraud, bribery and kickbacks.

Please contact **Chemonics Office of Business Conduct** with any questions or concerns regarding the above information or to report any potential violations. Potential violations may also be reported directly to Chemonics at to [BusinessConduct@chemonics.com](mailto:BusinessConduct@chemonics.com) or by phone/Skype at 888.955.6881.

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Attachment D GHSC-PSM Service Level Objectives

*Note: Attachments are not included in this document and have been provided as separate documents*

### **List of Acronyms**

ARTMIS	Automated Requisition Tracking Management Information System
CFR	Code of Federal Regulations
CO	USAID Contracting Officer
COP	Chief of Party
COR	USAID Contracting Officer's Representative
CV	Curriculum Vitae
EDI	Electronic Data Interchange
FAR	Federal Acquisition Regulations
FDR	Fixed Daily Rates
GHSC-PSM	Global Health Supply Chain Program – Procurement and Supply Management
IQS	Indefinite Quantity Subcontract
M&E	Monitoring and Evaluation
NICRA	Negotiated Indirect Cost Rate Agreement
NGO	Nongovernmental organization
PO	Purchase Order
RFP	Request for Proposals
SAF	Strategic Activities Fund
SOW	Scope of work
STO	Sub Task Order
UEI	Unique Entity Identifier
U.S.	United States
USAID	U.S. Agency for International Development
USG	U.S. Government

## Section I. Instructions to Vendors

### I.1. Introduction

Chemonics, the Buyer, acting on behalf of the U.S. Agency for International Development (USAID) and the USAID Global Health Supply Chain Program Procurement and Supply Management (GHSC-PSM), under contract number AID-OAA-I-15-00004 is soliciting offers from companies and organizations to submit proposals to participate with **GHSC-PSM** to provide **Third-Party EDI Service**.

The Global Health Supply Chain Program – Procurement and Supply Management (GHSC-PSM) project (alternately referred to herein as “GHSC-PSM” or “Project” or “Buyer”) is an official project of the United States Agency for International Development (USAID) implemented by Chemonics International and its consortium members. The purpose of GHSC-PSM is to ensure the uninterrupted supply of health commodities for U.S. government-funded public health initiatives around the world. Specifically, the Project provides procurement and supply chain management for the President’s Emergency Plan for AIDS Relief (PEPFAR), the President’s Malaria Initiative (PMI), and Population and Reproductive Health (PRH).

GHSC-PSM delivers a wide range of health commodities for these public health initiatives, including essential medicines, medical devices, test equipment, and other select commodities for HIV/AIDS, malaria, maternal and child health, and infectious diseases. To that end, GHSC-PSM supports a catalog of more than 3,875 commodities (non-manufacturer-specific) and 6,277 items (manufacturer-specific) provided by 325 suppliers. Each year, GHSC-PSM supplies approximately \$1 billion worth of commodities to over 60 countries.

Chemonics anticipates issuing an award for third-party EDI Services to one (1) company. The award(s) will be in the form of an indefinite quantity subcontract (IQS) with sub task orders (STOs) issued on a firm fixed price basis (hereinafter referred to as “the IQS”). The successful Vendor(s) shall be required to adhere to the statement of work and terms and conditions of the IQS, which are incorporated in Section III herein.

Vendors are invited to submit proposals in response to this IQS RFP in accordance with **Section I Instructions to Vendors**, which will not be part of the IQS. The instructions are intended to assist interested Vendors in the preparation of their offer. Any resulting subcontract will be guided by Sections II and III. Chemonics will subsequently solicit individual orders for the scope of services requested. These individual orders are called STOs. While the IQS will contain the main terms and conditions and the pricing methodology to be used in negotiating STOs, each STO will contain specific information regarding the services being requested by **GHSC-PSM** the period of performance, deliverables, and other details about the specific work ordered. STOs issued under the IQS will be on a **Fixed Price STO** basis. The Vendor shall develop a budget (i.e., cost proposal) for each STO using the pricing methodology set forth in the IQS. Chemonics will not reimburse the Vendor for any costs associated with managing the IQS; each STO must stand on its own.

This IQS RFP does not obligate Chemonics to execute any STOs nor does it commit Chemonics to pay any costs incurred in the preparation and submission of the proposals. Furthermore, Chemonics reserves the right to reject any and all offers, if such action is considered to be in the best interest of Chemonics.

Unless otherwise stated, the periods named in the IQS RFP shall be consecutive calendar days.

## I.2. Offer Deadline

Technical proposals and pricing quotations should be prepared based on the guidelines listed in this solicitation. Vendors shall submit their offers by email no later than **13:00 EST on May 11, 2023**. Vendors are responsible for ensuring that their offers are received in accordance with the instructions stated herein. In accordance to FAR 52.215-1(c)(3)(ii)(A) late offers may be considered at the discretion of Chemonics. Chemonics cannot guarantee that late offers will be considered.

## I.3. Submission of Offers

Proposals must be submitted electronically only, by email. Quotations and all correspondence and documents relating to the offer shall be in English.

Separate technical and cost proposals must be submitted by email no later than the time and date specified in I.2. The proposals must be submitted to **Bob Keating** at [rfp\\_edi\\_services@ghsc-psm.org](mailto:rfp_edi_services@ghsc-psm.org).

The Vendor must submit the proposal electronically by email in a format standard to MS Word, MS Excel, readable format, or Adobe Portable Document (PDF) format in a Microsoft XP environment. Vendors must not submit zipped files. Those pages requiring original manual signatures should be scanned and sent in PDF format as an email attachment.

The technical proposal and cost proposal must be kept separate from each other. Technical proposals must not make reference to pricing data in order that the technical evaluation may be made strictly on the basis of technical merit. The IQS RFP number must be included in the subject line.

## I.4. Requirements

To be determined responsive, an offer must include all of documents and sections included in I.4.A.

### A. General Requirements

Chemonics anticipates issuing an IQS to a **U.S. or international** company or organization, provided it is legally registered and recognized under the laws of **the United States or the country in which the provider is registered** and is in compliance with all applicable civil, fiscal, and other applicable regulations. Such a company or organization could include a private firm, non-profit, civil society organization, or university.

Companies and organizations that submit proposals in response to this IQS RFP must meet the following requirements:

- (i) Companies or organizations, whether for-profit or non-profit, must be legally registered under the laws of **the United States or the country in which the provider is registered** upon award of the IQS.
- (ii) Firms operated as commercial companies or other organizations or enterprises (including nonprofit organizations) in which foreign governments or their agents or agencies have a controlling interest are not eligible as suppliers of commodities and services.
- (iii) Companies or organizations, whether for-profit or non-profit, shall be requested to provide a UEI number if selected to receive an IQS valued at USD\$30,000 or more, unless exempted in accordance with information certified in the Evidence of Responsibility form included in the required certifications

in Attachment C.<sup>1</sup> Guidance on UEI and SAM registration is also provided in Annex 2. Each interested Vendor must submit completed *Representations and Certificate Forms included at Attachment C*.

## **B. Required Proposal Documents**

### **1. Cover Letter**

The Vendor's cover letter shall include the following information:

- i. Name of the company or organization
- ii. Type of company or organization
- iii. Address
- iv. Telephone
- v. E-mail
- vi. Taxpayer Identification Number
- vii. UEI Number

A sample template is included in Annex 1.

### **2. Technical Proposal**

Section II below details the technical and service requirements being sought in this RFP. The sections of the technical proposal must respond to the detailed information set out in Section II of this IQS RFP, which provides the background, states the scope of work, describes the deliverables, and provides a deliverables schedule.

Services offered in the proposal and pricing quotations must fully comply with the technical specifications referenced in this RFP. The proposal and pricing quotations must contain detailed specifications of the service(s) offered.

Responses shall be submitted via email by responding to the Technical Questionnaire excel spreadsheet provided (**Attachment A**). Vendors are welcome to submit an executive summary or narrative summarizing their response to this request. Chemonics reserves the right to check additional references not provided by a Vendor.

### **3. Cost Proposal (Business Pricing Proposal)**

Services offered in the proposal and pricing quotations must fully comply with the technical specifications referenced in this RFP. The proposal and pricing quotations must contain detailed specifications of the service(s) offered.

For pricing information, responses are input into the Business Pricing Proposal excel spreadsheet provided (**Attachment B**).

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<sup>1</sup> If Vendor does not have a UEI number and is unable to obtain one before proposal submission deadline, Vendor shall attach a copy of the UEI application; or, include a statement in their Evidence of Responsibility Statement noting their intention to register for a UEI number should it be selected as the successful Vendor or explaining why registration for a UEI number is not possible. Contact sam.gov to obtain a number: Further guidance on obtaining a UEI number is available from Chemonics upon request.

Quotations in response to this solicitation must be priced on a fixed-price, all-inclusive basis. The prices (unit prices and extended prices) must cover all subcontractor obligations for the performance of services required in this solicitation's terms and conditions. No additional sums will be payable for any change or escalation in the cost of materials, equipment, or labor. Pricing must be presented in US Dollar.

The Vendor shall agree that the Price(s) in the quote in response to this solicitation represents the lowest price(s) at which Vendor currently sells the Goods or Services offered under comparable terms and conditions to any United States Government or U.S. Government funded customers. If during the life of any subsequent subcontract, the subcontractor sells the Goods to any U.S. Government or U.S. Government funded customer for a lower price, it will promptly inform Chemonics/GHSC-PSM and execute an amendment to the subcontract so that such lower price applies to any pending or subsequent Goods delivered thereunder.

Offers must remain valid for 90 calendar days after the RFP due date.

The Vendors are expected to provide their best estimated lead time for both initiating the services from contract award and completing an integration of services with the Trading Partners based on the proposal. Lead time means the period between the signature of the subcontract award (inclusive of the STO) and the time when the goods or services are delivered (integrated/complete/operational). The lead time estimate presented in an offer in response to this solicitation must be upheld in the performance of any resulting contract.

Instructions are provided in **Attachment B** on how the cost proposal should be structured.

#### **I.5. Indefinite Quantity Type Subcontract and Future STOs**

a) This IQS RFP will result in the award of an indefinite quantity type subcontract with STOs issued thereunder priced on a firm fixed price basis to one Vendor. These STOs will be issued as the need arises. The award of the IQS – including quantities of supplies and services specified under it - are estimates only and are not purchased by the awarded IQS.

A Fixed Price STO is a subcontract for services, reports, or other tangible deliverables provided to and accepted by Chemonics on behalf of **GHSC-PSM**. As the name implies, the price of the STO is fixed, and it is not subject to any adjustment on the basis of the Subcontractor's cost experience in performing the work.

b) Delivery or performance shall be made only as authorized by STOs issued in accordance with the Ordering Procedures contained within the IQS. The Subcontractor shall furnish to Chemonics, when and if ordered, the supplies or services specified in the SOW of this subcontract.

c) Except for any limitations on quantities in the STO Limitations clause, there is no limit on the number of STOs that may be issued. Chemonics may issue STOs requiring delivery to multiple destinations or performance at multiple locations.

#### **I.6. Source of Funding, Authorized Geographic Code**

a) Any subcontract resulting from this IQS RFP will be financed by USAID funding and will be subject to U.S. Government and USAID regulations. All goods and services offered in response to this IQS RFP or supplied under any resulting award must meet USAID Geographic Code **935** in accordance with



the United States Code of Federal Regulations (CFR), 22 CFR §228, available at: <https://www.ecfr.gov/cgi-bin/text-idx?SID=bc646daa32249b2fcda27d1fce1c8ed2&mc=true&node=pt22.1.228&rgn=div5>.

Vendors may not offer or supply any products, commodities or related services that are manufactured or assembled in, shipped from, transported through, or otherwise involving any of the following countries: Cuba, Iran, North Korea, Syria. Related services include incidental services pertaining to any/all aspects of this work to be performed under a resulting contract (including transportation, fuel, lodging, meals, and communications expenses).

## I.7. Chronological List of Proposal Events

The following calendar summarizes important dates in the solicitation process. Vendors must strictly follow these deadlines.

RFP published	April 11, 2023
Proposal Conference	April 18, 2023
Deadline for written questions/clarifications	April 21, 2023
Answers provided to questions/clarifications	April 26, 2023
Proposal due date	May 11, 2023
EDI Subcontract Award (estimated)	May 30, 2023

The dates above may be modified at the sole discretion of Chemonics. Any changes will be published in an amendment to this IQS RFP.

**Proposal Conference.** A proposal conference will be held virtually via a Microsoft Team's Video Call **April 18, 2023, at 10:00 hours EST** to provide interested Vendors an opportunity to learn more about the **GHSC-PSM eco-system and requested EDI services**. GHSC-PSM will provide an overview of the GHSC-PSM eco-system and the various approaches that the project has considered to best utilize EDI. Suppliers may also ask any questions about this IQS RFP and the solicitation process. Chemonics welcomes any organization to attend this proposal conference. Pre-registration to attend the proposal conference is required. Please email an expression of interest and any advance questions by 15:00 hours on **April 17, 2023**, to [RFP\\_EDI\\_Services@ghsc-psm.org](mailto:RFP_EDI_Services@ghsc-psm.org). An invitation to the proposal conference will be shared by email to Vendors who submit an expression of interest.

Written notes from the proposal conference will be provided electronically to all registered Vendors, including those Vendors who submitted written questions prior to the proposal conference, but were unable to attend the proposal conference in person. Participation in the proposal conference and Vendors are the responsibility of the Vendor. Chemonics will not reimburse Vendors for any costs associated with attending the proposal conference.

**Written Questions and Clarifications.** All questions or clarifications regarding this RFP must be in writing and submitted to [RFP\\_EDI\\_Services@ghsc-psm.org](mailto:RFP_EDI_Services@ghsc-psm.org) no later than **17:00 EST on April 21, 2023**. Questions and requests for clarification, and the responses thereto, will be circulated to all RFP recipients who have indicated an interest in this RFP.

Only written answers from Chemonics will be considered official and carry weight in the RFP process and subsequent evaluation. Any answers received outside the official channel, whether received verbally or in

writing, from employees or representatives of Chemonics International, the **GHSC-PSM** project, or any other party, will not be considered official responses regarding this IQS RFP.

**Proposal Submission Date.** All proposals must be received by **17:00 EST on May 11, 2023**. Late offers will be considered at the discretion of Chemonics.

**Oral Presentations.** Chemonics reserves the option to have select Vendors participate in oral presentations with the technical evaluation committee. Interviews may consist of oral presentations of Vendors' proposed activities and approaches. Vendors should be prepared to give presentations to the technical evaluation committee at the **GHSC-PSM** office within 5 days of receiving notification.

**Subcontract Award (estimated).** Chemonics will select the proposal(s) that offer the best value based upon the evaluation criteria stated in this IQS RFP.

## **I.8. Validity Period**

Vendors' proposals must remain valid for **ninety (90)** calendar days after the proposal deadline.

Vendors are expected to have sole responsibility for taking steps to carefully examine in detail the full consistency of its quote to the requirements of the solicitation, keeping in mind that material deficiencies in providing information requested by GHSC-PSM, or lack of clarity in the description of the goods to be provided, may result in the rejection of the quote.

Prior to the RFP closing date, a Vendor may substitute or modify its proposal, inclusive of but not limited to the Technical Questionnaire and Business Pricing Proposal, after it has been submitted by notifying GHSC-PSM and resubmitting a revised proposal by the RFP closure date. A Vendor may withdraw its proposal after it is submitted by sending a notification email to GHSC-PSM.

Unless otherwise accepted by Chemonics, no quote may be withdrawn, substituted, or modified in the interval between the RFP closing date and the expiration of the period of quote validity specified by the Subcontractor or any extension thereof.

## **I.9. Evaluation and Basis for Award**

Proposals that meet the minimum technical requirements will be evaluated based on the following evaluation criteria, listed in order of importance:

- **Technical Capability & Service Offering(s)**
- **Price**
- **Overall Past Performance and Experience with identified Key Trading Partners**
- **Implementation Timelines**
- **GS1 Experience**

Below is a summary on each evaluation criterion:

**Technical Capability.** Offers shall be evaluated based on their ability to meet the requirements outlined in Section 2- Technical Proposal in terms of technical capabilities and service offerings. The evaluation includes responses to *Attachment A. EDI RFP Technical Questionnaire* and is inclusive,

but not limited to topics such as onboarding of Trading Partners, management of integrations, technical capability, proposed EDI Project Manager, service, and maturity.

***Offered Price.*** Vendors shall be evaluated based on a provided Bill of Materials (BOM) with itemized hardware/software services and managed services per the assumptions on transactions and Trading Partners provided. The Bill of Materials shall be provided by completing and submitting *Attachment B. Business Pricing Proposal*.

***Overall Past Performance and Experience with Key Trading Partners.*** Vendors shall be evaluated on their past performance implementing programs similar in scope to this request. Vendors are asked to provide a minimum three narratives on the implementation of similar projects. The narrative is to be limited to one page each. The narrative shall summarize the client, size, scope, implementation timelines and current state of the project. References are encouraged.

Vendors shall be evaluated if they have existing integrations with GHSC-PSM Trading Partners identified in this solicitation that will have a positive impact on implementation timelines. Vendor experience with pharmaceutical Trading Partners will also be evaluated.

***Implementation Timelines.*** Vendor shall be evaluated based on the proposed timelines provided based on the assumptions in this solicitation. The Vendors are expected to provide their best estimated lead time for both initiating the services from contract award and completing an integration of services with the Trading Partners based on the proposal. Lead time means the period between the signature of the subcontract award (inclusive of the STO) and the time when the goods or services are delivered (integrated/complete/operational). The lead time estimate presented in an offer in response to this solicitation must be upheld in the performance of any resulting contract.

***GS1 Experience.*** Vendor shall have experience transacting with and translating GS1 XML standard EDI messages, and using GS1 identification, messaging and data standards in transactions.

*Chemonics reserves the right to conduct negotiations with and/or request clarifications from any Subcontractor prior to award. If there are significant deficiencies regarding responsiveness to the requirements of this RFP, an offer may be deemed “non-responsive” and thereby disqualified from consideration. Chemonics reserves the right to waive immaterial deficiencies at its discretion. In submitting a response to this RFP, the Vendors understand that USAID is not a party to this solicitation and that the Vendors agree that any questions or concerns hereunder must be presented (in writing with full explanations) to Chemonics for consideration. Chemonics reserves the right to cancel this RFP at any time.*

An award will be made to the Vendor whose proposal is determined to be responsive to this solicitation document, meets the eligibility criteria stated in this IQS RFP, meets the technical, management/personnel, and corporate capability requirements, and is determined to represent the best value to Chemonics.

**I.10. Negotiations**

Best offer proposals are requested. It is anticipated that an IQS will be awarded solely on the basis of the original offers received. However, Chemonics reserves the right to conduct discussions, negotiations and/or request clarifications prior to awarding a IQS. Furthermore, Chemonics reserves the right to conduct a competitive range and to limit the number of Vendors in the competitive range to permit an efficient evaluation environment among the most highly-rated proposals. Highest-rated Vendors, as determined by the technical evaluation committee, may be asked to submit their best prices or technical responses during a competitive range. At the sole discretion of Chemonics, Vendors may be requested to conduct oral presentations. If deemed an opportunity, Chemonics reserves the right to make separate awards per component or to make no award at all.

**I.11. Terms of Subcontract**

This is a request for proposals only and in no way obligates Chemonics to award a subcontract. In the event of IQS negotiations, any resulting IQS will be subject to and governed by the terms and clauses detailed in Section III. Chemonics will use the template shown in section III to finalize the IQS. Terms and clauses are not subject to negotiation. By submitting a proposal, Vendors certify that they understand and agree to all of the terms and clauses contained in section III.

**I.12. Confidentiality & Privity**

Information relating to the examination and evaluation of the quote, and the recommendation of the award, shall not be disclosed to any other Vendors/persons not officially concerned with such process.

If the Subcontractor is unsuccessful, the Subcontractor will receive an “Unsuccessful Subcontractor Letter” from GHSC-PSM. The purpose of the letter is to provide feedback on the strengths and weaknesses of the Subcontractor’s submission in order to assist the Subcontractor in improving subsequent Offer(s) presented to GHSC-PSM and to be a stronger competitor in all future procurement opportunities.

By submitting a response to this request for proposals, Vendors understand that USAID is NOT a party to this solicitation. Vendors agree that any protest to this RFP must be presented in writing with a full explanation of the Vendors concerns to Chemonics for consideration. USAID will not consider protests made to USAID under USAID-funded projects. At its sole discretion, Chemonics will make a final decision on the protest at a level above the Global Supply Chain Director.

## **Section II      Background, Scope of Work, Period and Place of Performance, Staffing, Expected Deliverables, and Deliverables Schedule**

### **II.1. Background**

#### **A. GHSC-PSM**

The Global Health Supply Chain Program – Procurement and Supply Management (GHSC-PSM) project (alternately referred to herein as “GHSC-PSM” or “Project” or “Buyer”) is an official project of the United States Agency for International Development (USAID) implemented by Chemonics International and its consortium members. The purpose of GHSC-PSM is to ensure the uninterrupted supply of health commodities for U.S. government-funded public health initiatives around the world. Specifically, the Project provides procurement and supply chain management for the President’s Emergency Plan for AIDS Relief (PEPFAR), the President’s Malaria Initiative (PMI), and Population and Reproductive Health (PRH).

GHSC-PSM delivers a wide range of health commodities for these public health initiatives, including essential medicines, medical devices, test equipment, and other select commodities for HIV/AIDS, malaria, maternal and child health, and infectious diseases. To that end, GHSC-PSM supports a catalog of more than 3,875 commodities (non-manufacturer-specific) and 6,277 items (manufacturer-specific) provided by 325 suppliers. Each year, GHSC-PSM supplies approximately \$1 billion worth of commodities to over 60 countries.

#### **B. GHSC-PSM Technical Architecture**

The GHSC-PSM technical architecture is a highly integrated eco-system that brings the Project’s consortium of partners and systems together under one umbrella. The GHSC-PSM eco-system is designed to provide end-to-end, real-time visibility into the global supply chain, primarily to the central medical store in each country, to ensure immediate transfer of information and to enable evidence-based decision-making. The three core components of the GHSC-PSM eco-system are:

- ARTMIS (Automated Requisition Tracking Management Information System): supports GHSC-PSM contracts through procurement operations and is managed by the GHSC-PSM MIS Team.
- InforNexus: supports the Project’s logistics operations and is managed by Kuehne + Nagel.
- D365: supports the Project’s finance operations and is managed by Chemonics International.

This is the GHSC-PSM eco-system into which the Electronic Data Interchange (EDI) solution from this solicitation will be implemented. Additional background on each system is provided below:

#### **ARTMIS (Automated Requisition Tracking Management Information System):**

ARTMIS serves as the sourcing and procurement backbone of GHSC-PSM, providing:

- e-Catalog for order placement
- Order Management
- Contract Management (SRM, Sourcing, Contracts)
- Business Intelligence and Analytics (sourcing optimization, supply/demand, logistics optimization, etc.)

ARTMIS is integrated with Kuehne + Nagel’s logistics management information system (InforNexus), and Chemonics’ financial management information system (D365). This allows for comprehensive, real-time information on the logistical data corresponding to all orders and shipments in the system, and visibility into the associated financials for USAID, as they receive monthly-automated statements across all locations in which the project operates.

**InforNexus:**

InforNexus serves as the logistics management backbone of GHSC-PSM, providing cloud-based global logistics visibility and control of GHSC-PSM shipments managed by third-party logistics partners and Key Trading partners. InforNexus is made available to GHSC-PSM through its partnership with Kuehne-Nagel, who manages the technology partnership. InforNexus covers all international shipping modes and both inbound and outbound flows. ARTMIS and InforNexus are currently integrated and share order and shipment data on a real-time basis.

**Dynamics 365:**

Dynamics 365 (hereinafter referred to as D365) serves as the financial backbone of GHSC-PSM, supporting GHSC-PSM invoice processing and payments. D365 is made available to GHSC-PSM by Chemonics, who uses D365 as its cloud-based Enterprise Resource Planning (ERP) system platform. D365 integrates and supports Chemonics' core business operations, including finance, project management, operations, business intelligence, human resources, procurement, subcontracts, and grants management.

**II.2. Scope of Work**

Chemonics is conducting this RFP to identify and evaluate third party Software as a Service (SaaS) solutions for electronic data interchange (EDI) between the GHSC-PSM eco-system and its health commodity suppliers to enhance operational efficiency and supply chain visibility through the electronic exchange of data. Electronic Data Interchange (EDI) is the machine-to-machine exchange of business transactions/messages (e.g., orders, order confirmation, ship notice, etc.) between trading partners. Using standardized EDI messages to automate business transactions reduces cost, reduces errors, increases processing speed, and enhances the amount and quality of data available to trading partners to support operations. Our goal is to leverage GS1 standardized messages incorporating GS1 standardized identifiers (GTIN, GLN, and SSCC) and data to enhance efficiency and visibility / traceability for all global health supply chain participants.

Chemonics is seeking a managed service to provide and manage this capability, including maintenance of Service Level Objectives (SLOs), management of GHSC-PSM suppliers' integrations with the vendor, and exceptions/escalation management. Interested vendors are asked to propose the optimal approach for the managed service based on the GHSC-PSM ecosystem, cost, and EDI best practices.

**A. Integrate/Implement Hosted EDI Solution**

EDI vendor shall provide GHSC-PSM with a hosted EDI SaaS solution and represent GHSC-PSM as its EDI Service Provider when communicating EDI messages to GHSC-PSM's Trading Partners. The EDI vendor will integrate with the GHSC-PSM eco-system to transmit and manage the flow of EDI messages. The Vendor is responsible for providing a cloud-hosted solution, for which the details should be provided in response to this proposal.

The EDI vendor will integrate with and onboard GHSC-PSM trading partners. EDI Vendor will electronically receive, process, and transmit the following EDI transactions between GHSC-PSM and its Trading Partners:

- Purchase Order (PO)
- PO Confirmation/Acknowledgement
- Advance Ship Notice (ASN)/Despatch Advice
- Invoice

The EDI vendor will provide guidance and recommendations on how GHSC-PSM can best integrate EDI capabilities into the GHSC-PSM eco-system from a best-practice and cost perspective. Note: Chemonics has considered that transactions may be sent to different nodes in the GHSC-PSM eco-system. For example, PO/PO confirmations could be sent to/from the ARTMIS order management module managed by IBM's Integration Bus (IIB), while the ASN transactions could be sent to the Logistics Management module (InforNexus), managed by Kuehne & Nagle.

GHSC-PSM has contracts with over 300 suppliers. The project would like to utilize EDI for a pilot group of suppliers during the initial period of performance. The transaction types, estimated volumes, and the trading partners with whom GHSC-PSM would engage in a Pilot are listed below.

Transaction type	Total transactions per year
PO (assumes one per PO line)	2237
PO Confirmation (assumes one per PO line)	2237
ASN (assumes 2 messages per PO line, with acknowledgement)	4474
Invoice (assumes 2 messages per PO line, with acknowledgement)	4474
<b>Total transactions for all 8 Pilot trading partners per year</b>	<b>13,422</b>
<b>Average number of transactions per Pilot trading partners per year</b>	<b>1678</b>
<b>Average transaction for all 8 Pilot trading partners per month</b>	<b>1118</b>
<b>Average transaction per Pilot trading partners per month</b>	<b>139</b>

Chemonics anticipates these transactions will occur with the following pharmaceutical and laboratory agent suppliers, hereinafter referred to as Trading Partners.

Key Trading Partners:
APL Healthcare Limited
Hetero Labs Ltd.
Laurus Labs Limited
Macleods Pharmaceuticals Ltd.
Mylan Laboratories Limited
Abbott Laboratories
Roche Holding AG
Hologic

**B. PROVIDE PROJECT MANAGEMENT/TRANSITION COORDINATION**

The selected vendor shall provide project management and transition. The required capabilities of the vendor include:

1. Vendor will provide an experienced EDI Project Manager whose primary responsibilities will be to coordinate schedules, communications, and activities to ensure the project remains on time and successful.
2. Vendor will provide an implementation timeline and regular updates to it as the project progresses.

**C. PROVIDE EDI DESIGN, MAPPING, TESTING, AND IMPLEMENTATION APPROACH**

The selected vendor shall manage and provide the solution architecture, design, mapping, testing and implementation approach. The required capabilities of the vendor include:

1. Vendor will coordinate design of solution architecture across Trading Partners and GHSC-PSM.
2. Vendor will provide guidance to GHSC-PSM on best practices of integrations between various internal systems (as specified above).
3. Vendor will work with GHSC-PSM and with Trading Partners to map EDI fields to existing fields and requirements.
4. Vendor will provide a testing plan for review/approval by GHSC-PSM.
5. Vendor will provision a testing/staging environment for implementation testing and post-implementation change request testing.

**D. PROVIDE TRADING PARTNER SUPPORT**

The selected vendor shall manage all Trading Partner support and integrations. This does not include data sharing agreements that may need to be established between GHSC-PSM and its Trading Partners. It does include any data sharing agreements that the vendor may need to establish with the Trading Partners. The required capabilities of the vendor include:

1. Vendor will have experience in providing and provision exemplary Trading Partner Data Sharing agreements.
2. Vendor will be responsible for Trading Partner outreach related to integrations and issue management.
3. Vendor is responsible for on-boarding trading partners and certificate management.
4. Vendor is responsible for hosting a customer service component for Trading Partners who require assistance; this should be a global capability.

**E. PROVIDE HOSTED TRANSACTION MANAGEMENT**

The selected vendor shall manage all transactions between Trading Partners and vendor, and vendor and GHSC-PSM. The required capabilities of the vendor include:

1. Vendor is responsible for monitoring EDI integrations and transactions.
2. Vendor is responsible for automated review/validation of transactions, identifying integration/transactions issues and errors (exceptions management) in a timely manner and offering assistance for resolution.
3. Vendor will provide a proposed level of support for transaction management (ranging from identification/notification of exceptions to GHSC-PSM, to proactive resolution of exceptions).
4. Vendor is responsible for validating transactions to ensure they meet the standard messaging format prior to transmission of messages between Trading Partners and GHSC-PSM through vendor.



**F. PROVIDE CUSTOMER SUPPORT**

The selected vendor shall be responsible for providing customer support to GHSC-PSM Trading Partners and GHSC-PSM. The required capabilities of the vendor include:

1. Vendor will provide Customer service availability and metrics for support availability (ex. 24/7, Helpdesk hours, etc.) as well as response/turnaround times.
2. Vendor will provide a standard support plan to identify how different severity issues are classified and managed/handled (ex. see section 1.4 Incident Definitions in **Attachment D GHSC-PSM Service Level Objectives**).
3. Vendor will provide visibility into the status of defect management (ex. through a shared DevOps tool, etc.).
4. Vendor will provide proactive system monitoring and reporting metrics on transaction performance and volume.
5. Vendor will host a user interface to monitor/manage transaction performance and volumes; specifically, provide visibility into:
  - Trading Partner transactions to vendor
  - Data transformations
  - Exceptions and failed transactions

**G. PROVIDE CHANGE MANAGEMENT SUPPORT**

The selected vendor shall be responsible for managing any required changes to the EDI project once it is implemented. The required capabilities of the vendor include:

1. Vendor will provide a detailed plan on how changes are to be managed (through development, configuration, managed by a GHSC-PSM administrator, etc.).
2. Vendor will host a regular meeting with GHSC-PSM to provide updates and visibility into the status of change requests and any applicable releases (ex. Change Control Board, etc.).

**H. MEET SERVICE LEVEL OBJECTIVES (SLO) MAINTENANCE REQUIREMENTS**

The selected vendor shall be expected to maintain SLO requirements. The SLO (in **Attachment D – GHSC-PSM Service Level Objectives**) gives vendors an understanding of the contractual requirements that both Chemonics and Chemonics' Trading Partners need to meet based on the severity of the issue.

The required capabilities of the vendor include:

1. Vendors awarded under this contract need to be able to meet or exceed the contractual obligations in effect today.
2. GHSC-PSM also requires that our Management Information System (MIS) and technical teams be involved providing input/acceptance in their maintenance events - frequency, impact, etc. so that it adheres or maps to our maintenance schedule. This applies to both non-production and production instances.
3. Any deviations to this agreement must be approved as part of the contract negotiation process. If vendor has standard SLOs that are issued to other customers, they will be provided to GHSC-PSM for review as part of this solicitation.

**II.3. Period of Performance**

The anticipated period of performance for the IQS is effective from the date of subcontract award through **November 28, 2024**. This is the current expiry date of the GHSC-PSM contract with USAID. The period of performance may be extended should the GHSC-PSM contract be extended. USAID intends to continue this program with limited disruption through additional contracting mechanisms.

#### **II.4. Staffing**

The Vendor shall propose an EDI Project Manager and technical experts, as required, that are available to work on a **long-term** or recurring basis on one or more STOs issued under the IQS. The technical expert(s) should have experience and expertise in standards-based EDI integration, implementation and use.

#### **II.5. Expected Deliverables**

This is an indefinite quantity type subcontract with STOs issued hereunder priced on a firm fixed price basis. The deliverables will be determined on a task order basis.

#### **II.6. Deliverables Schedule**

The deliverables schedule will be determined on a STO basis.

### **Section III Indefinite Quantity Subcontract (Terms and Clauses)**

In the event of a subcontract award resulting from an offer submitted in response to this RFP, the terms and conditions within the attached IQS draft contract template will apply (See *Attachment E\_IQS\_Subcontract Template for GHSC-PSM*). Chemonics, at its own discretion, reserves the right to modify these terms.

**Annex 1      Cover Letter**

[Vendor: Insert date]

Bob Keating  
TO1 Integrated Supply Chain Manager  
GHSC-PSM  
Chemonics International Inc.  
1275 New Jersey Avenue SE, Suite 200  
Washington, D.C. 20003-382213

Reference:      Request for Proposals IQS Third-Party EDI Services RFP03333

Subject:      **[Vendor: Insert name of your organization]**'s technical and cost proposals

Dear Mr. Keating:

**[Vendor: Insert name of your organization]** is pleased to submit its proposal in regard to the above-referenced request for proposals. For this purpose, we are pleased to provide the information furnished below:

Name of Organization's Representative	_____
Name of Vendor	_____
Type of Organization	_____
Taxpayer Identification Number	_____
UEI Number	_____
Address	_____
Address	_____
Telephone	_____
Fax	_____
E-mail	_____

As required by section I, I.7, we confirm that our proposal, including the cost proposal will remain valid for **90** calendar days after the proposal deadline.

We are further pleased to provide the following annexes containing the information requested in the IQS RFP.:

**[Vendors: It is incumbent on each Vendor to clearly review the IQS RFP and its requirements. It is each Vendor's responsibility to identify all required annexes and include them]**

Sincerely yours,

\_\_\_\_\_  
Signature  
**[Vendor: Insert name of your organization's representative]**  
**[Vendor: Insert name of your organization]**

## **Annex 2 UEI and SAM Registration Guidance**

### **What is UEI?**

The Unique Entity Identifier, or the UEI, is the official name of the “new, non-proprietary identifier” that will replace the DUNS number. The UEI will be requested in, and assigned by, the System for Award Management (SAM.gov). Businesses and organizations who receive funding from the US government will have to use a Unique Entity Identifier (UEI) created in SAM.gov. The UEI number helps the USG to identify companies.

### **Why am I being requested to obtain a UEI number?**

U.S. law – in particular the Federal Funding Accountability and Transparency Act of 2006 (Pub.L. 109-282), as amended by section 6202 of the Government Funding Transparency Act of 2008 (Pub.L. 110-252) - make it a requirement for all entities doing business with the U.S. Government to be registered, currently through the System for Award Management, a single, free, publicly- searchable website that includes information on each federal award. As part of this reporting requirement, prime contractors such as Chemonics must report information on qualifying subawards as outlined in FAR 52.204-10 and 2CFR Part 170. Chemonics is required to report subcontracts with an award valued at greater than or equal to \$30,000 under a prime contract and subawards under prime grants or prime cooperative agreements obligating funds of \$25,000 or more, whether U.S. or locally-based. Because the U.S. Government uses UEI numbers to uniquely identify businesses and organizations, Chemonics is required to enter subaward data with a corresponding UEI number.

### **Is there a charge for obtaining a UEI number?**

No. Obtaining a UEI number is absolutely free for all entities doing business with the Federal government. This includes current and prospective contractors, grantees, and loan recipients.

### **How do I obtain a UEI number?**

UEI numbers can be obtained online at sam.gov.

### **What information will I need to obtain a UEI number?**

To request a UEI number, you will need to provide the following information:

- Legal name and structure
- Tradestyle, Doing Business As (DBA), or other name by which your organization is commonly recognized
- Physical address, city, state and Zip Code
- Mailing address (if separate)
- Telephone number
- Contact name
- Number of employees at your location
- Description of operations and associated code (SIC code found at <https://www.osha.gov/pls/imis/sicsearch.html>)
- Annual sales and revenue information
- Headquarters name and address (if there is a reporting relationship to a parent corporate entity)

**How long does it take to obtain a UEI number?**

The UEI number is issued immediately upon completion of the request process.

**Are there exemptions to the UEI number requirement?**

There may be exemptions under specific prime contracts, based on an organization's previous fiscal year income when selected for a subcontract award, or Chemonics may agree that registration is impractical in certain situations. Organizations may discuss these options with the Chemonics representative.

**What is CCR/SAM?**

Central Contractor Registration (CCR)—which collected, validated, stored and disseminated data in support of agency acquisition and award missions—was consolidated with other federal systems into the System for Award Management (SAM). SAM is an official, free, U.S. government-operated website. There is NO charge to register or maintain your entity registration record in SAM.

**When should I register in SAM?**

While registration in SAM is not required for organizations receiving a grant under contract, subcontract or cooperative agreement from Chemonics, Chemonics requests that partners register in SAM if the organization meets the following criteria requiring executive compensation reporting in accordance with the FFATA regulations referenced above. SAM.gov registration allows an organization to directly report information and manage their organizational data instead of providing it to Chemonics. Reporting on executive compensation for the five highest paid executives is required for a qualifying subaward if in your business or organization's preceding completed fiscal year, your business or organization (the legal entity to which the UEI number belongs):

- (1) received 80 percent or more of its annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; **and**
- (2) \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; **and,**
- (3) The public **does not** have access to information about the compensation of the executives in your business or organization (the legal entity to which the UEI number it provided belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the US Internal Revenue Code of 1986.

If your organization meets the criteria to report executive compensation, the following sections of this document outline the benefits of and process for registration in SAM.gov. Registration may be initiated at <https://www.sam.gov>. There is NO fee to register for this site.

**Why should I register in SAM?**

Chemonics recommends that partners register in SAM to facilitate their management of organizational data and certifications related to any U.S. federal funding, including required executive compensation reporting. Executive compensation reporting for the five highest paid executives is required in connection with the reporting of a qualifying subaward if:

- a. In your business or organization's preceding completed fiscal year, your business or organization (the legal entity to which the UEI number belongs) received (1) 80 percent or more of its annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; and (2) \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; and,
- b. The public have does not have access to information about the compensation of the executives in your business or organization (the legal entity to which the UEI number it provided belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986.

### **What benefits do I receive from registering in SAM?**

By registering in SAM, you gain the ability to bid on federal government contracts. Your registration does not guarantee your winning a government contract or increasing your level of business. Registration is simply a prerequisite before bidding on a contract. SAM also provides a central storage location for the registrant to supply its information, rather than with each federal agency or prime contractor separately. When information about your business changes, you only need to document the change in one place for every federal government agency to have the most up-to-date information.

### **How do I register in SAM?**

Follow the step-by-step guidance for registering in SAM for assistance awards (under grants/cooperative agreements) at: [https://www.sam.gov/sam/transcript/Quick\\_Guide\\_for\\_Grants\\_Registrations.pdf](https://www.sam.gov/sam/transcript/Quick_Guide_for_Grants_Registrations.pdf)

Follow the step-by-step guidance for contracts registrations at:  
[https://www.sam.gov/sam/transcript/Quick\\_Guide\\_for\\_Contract\\_Registrations.pdf](https://www.sam.gov/sam/transcript/Quick_Guide_for_Contract_Registrations.pdf)

*You must have a UEI number in order to begin either registration process.*

If you already have the necessary information on hand (see below), the online registration takes approximately one hour to complete, depending upon the size and complexity of your business or organization.

### **What data is needed to register in SAM?**

SAM registrants are required to submit detailed information on their company in various categories. Additional, non-mandatory information is also requested. Categories of required and requested information include:

- \* General Information - Includes, but is not limited to, UEI number, CAGE Code, company name, Federal Tax Identification Number (TIN), location, receipts, employee numbers, and web site address.
- \* Corporate Information - Includes, but is not limited to, organization or business type and SBA-defined socioeconomic characteristics.
- \* Goods and Services Information - Includes, but is not limited to, NAICS code, SIC code, Product Service (PSC) code, and Federal Supply Classification (FSC) code.
- \* Financial Information - Includes, but is not limited to, financial institution, American Banking Association (ABA) routing number, account number, remittance address, lock box number, automated clearing house (ACH) information, and credit card information.

\* Point of Contact (POC) Information - Includes, but is not limited to, the primary and alternate points of contact and the electronic business, past performance, and government points of contact. \* Electronic Data Interchange (EDI) Information\* - Includes, but is not limited to, the EDI point of contact and his or her telephone, e-mail, and physical address. (\*Note: EDI Information is optional and may be provided only for businesses interested in conducting transactions through EDI.)