

STRATEGIC PLANNING RFP: CLARIFYING QUESTIONS

POSITIONING OF HSG

- 1. Has there been a systematic review of competitors (national and international) and/or established or potential collaborator organizations? If so, can we have sight of it?**

Such a document is not available.

- 2. Has the HSG expanded its influence with IGOs, governments and providers? If so, what are the priorities in terms of greatest impact and implementation.**

HSG strives to assure inclusiveness and connection across its diverse membership and stakeholder groups (researchers, policymakers, program managers, advocates, community organizations, media representatives) from different geographic regions, country income groups and language backgrounds.

Our priority is for balanced participation of all players in its signature event – the HSR symposium - by giving a voice and space to researchers, policymakers, practitioners, students, NGOs, and civil society from both low and high-income countries to allow possible collaboration on areas of mutual interests within health systems research and strengthening.

STRATEGIC REVIEW

- 1. What work has the Strategic Planning Working Group (SPWG) undertaken to evaluate progress against the 2016-2020 strategic actions. Can we have sight of it?**

The HSG secretariat commissioned an external evaluation of the 2016-2020 strategic plan, the [full report](#) to the evaluation findings are available to our members.

- 2. Has SPWG defined any new strategic actions for 2021-2026?**

We expect that the strategic actions for the 2021-2026 period will emerge from the work of the Consultant.

- 3. Would you share the composition of the SPWG?**

The composition of the SPWG can be found on the HSG website: <https://healthsystemsglobal.org/about-us/governance/>. Candidates are required to identify any conflicts of interest during the submission process.

- 4. Has SPWG given any consideration as to how it might evaluate the changing global context for health systems.**

We expect that the Consultant consider and propose this approach.

- 5. Could we have access to the mid-term review as mentioned in Strategic Objective 4 of the annual report 2019.**

The HSG secretariat commissioned an external evaluation of the 2016-2020 strategic plan, the [full report](#) to the evaluation findings are available to our members.

- 6. Under 'review of existing plans and pertinent documents', can you please clarify which documents and plans will be made available?**

These documents include:

- [The Mid-Term Review](#)
- [Capacity Strengthening Survey Findings](#)
- Previous Strategic Plans

- [HSG Strategic Plan 2016 - 2020](#)
- [HSG Strategic Plan 2013-2015](#)
- HSG By-laws
- Annual Reports
 - [2017](#)
 - [2018](#)
 - [2019](#)
- [Symposium Evaluation Report](#)

7. Please clarify what is meant by a needs assessment/environmental analysis.

A needs assessment / environmental analysis provides direction in the Strategic Planning process, ensure feasibility for implementation and sustainability. The findings will also help to keep the activities outlined in the Strategic Plan founded on sound data and insights.

8. To what the extent has the Strategic Planning Working Group consulted members in advance of this process and/or conducted research as inputs?

Research inputs, developed in advance of this process, include:

[Capacity Strengthening Survey Findings](#)

[The Mid-Term Review](#)

[Symposium Evaluation Report](#) 2021

9. Please confirm whether the scope of work includes reviewing/updating the number and/or nature of the Thematic Working Groups, or whether the scope assumes that the current TWGs will remain the same over the applicable period 2021-2026.

The scope of work does not include reviewing the number and/or nature of the Thematic Working Groups (TWGs). The TWG refresh process has recently taken place and a new set of TWGs for 2021-2025 have already been identified.

10. Please confirm whether the scope of work includes reviewing/updating the current governance structure or organisational design of HSG, or whether the scope assumes that it will remain the same over the applicable period 2021-2026.

The governance structure and organizational design of HSG will maintain the current formation.

11. What was the rationale for determining the Vision/Mission were not needed to be refreshed?

The SPWG determined that the vision and mission of HSG do not need to be updated given how recently they were developed. This exercise will focus on refreshing and re-energizing the strategic objectives and developing a five-year Strategic Plan.

12. What are the expectations for the M&E inputs (indicators) in the strategic plan?

We would expect the Consultant to recommend the M&E indicators.

FINANCES

1. The annual report 2019 demonstrates a decline in income through donors with reliance on membership and symposium income. Is that the financial model for HSG in terms of sustainability and growth or is there opportunity to explore this as part of strategy development?

It is HSG's financial model that revenue generating sources for the organization are donor funds, symposium (registration income + exhibition income + satellite session sales) and membership fees, but we are open to other opportunities for diversification.

2. Could we have sight of the profit/loss from the 2020 symposium?

We can share trends between 2016 and 2018 at this time. <https://healthsystemsglobal.org/wp-content/uploads/2020/08/HSG-Annual-Report-summary-2019.pdf>

3. Could we have insight to the deferential between symposium income in 2018 as opposed to 2019 (reference Annual report 2019).

The symposium is conducted bi-annually, and trends between 2018 and 2018 can be reviewed at this time. <https://healthsystemsglobal.org/wp-content/uploads/2020/08/HSG-Annual-Report-summary-2019.pdf>

OPERATIONAL

1. How do the thematic groups interact and operate with the regional networks- is there a structured approach to aligning activities. Is there an overarching governance structure for reporting and joint working/sharing.

TWGs and regional networks mostly collaborate on pre-symposium conferences/convenings, however greater collaboration is expected in capacity strengthening and advocacy for the HPSR field.

2. Further to the information in the annual report 2019, are there accessible individual thematic group progress reports in terms of action into outcomes/impact?

TWG achievements and key outputs are listed on their [webpages](#) on HSG website, however performance reports are for internal use only.

3. Is there a plan, report or initiative outlining the support of HSG to members focussing on building health system resilience during COVID-19?

HSG maintains an ongoing collection of [articles, blogs, social](#) and [multimedia content](#), fully curated by the members of the society, exploring evidence and learning on and for health policy and systems responses to COVID-19.

HSG has also created a [Wakelet Collection](#) with resources on COVID-19 and the implications for health policy and systems. HSG members and HSG partners are contributing to this collection to share knowledge and experiences in addressing COVID in different country contexts.

We have integrated a COVID-19 stream into the HSR2020 scientific program to provide a much-needed platform for engaging public and private sectors; governments, frontline health providers, implementers, innovators, NGOs, communities and citizens; and health and other sectors in deliberations about strengthening the health system response to COVID-19 and re-imagining health systems against a shared global threat to health, wellbeing and social justice.

4. Would consultations with external stakeholders – both public and private sector - require cooperation agreements?

We expect the consultant to identify if and when a formal letter on behalf of HSG may be required to support external consultations.

5. Approximately how many persons and/or groups do you hope to engage? With such a large network of members, I'm wondering if you have a target number that would, for you, be reflective of a representative sample of your stakeholders. Also, do you have preferred data collection methodologies (e.g., online surveys, virtual focus groups, interviews, etc.)?

We expect the Consultant to propose the methodology to be applied.

6. Are you looking for a like-for-like strategic plan to your previous one? Or are there areas you thought could have been stronger/enhanced or look a bit differently?

We expect the candidate to propose its structure, work with HSG membership and stakeholders as well as advise, guide and provide pointers in the current cultural contexts.

MEMBERSHIP GROWTH

- 1. Does HSG have a targeted approach to increase membership? Could we be provided with the plan?**

While HSG aims to increase membership in the regions, currently there is no formal strategy or plan to share.

IMPACT ASSESSMENT

- 1. For research and evaluation initiatives supported through HSG grants what is the conversion rate into published articles? Is there further action (knowledge exchange, policy, implementation science, multi-sectoral action) that has enabled members to initiate change in in their countries.**

Since HSR2016, HSG has published post-symposium supplements (after each symposium) + [women mentorship supplement](#), + Medicines TWG [supplement](#), + publications in peer-reviewed journals financially supported by the SHAPES TWG small grants.

- 2. Is the framework for grants through open competition or themes? What are the expectations in terms of alignment with the wider priorities of members?**

HSG opportunities for grants and participation are published widely through website and social media channels.

- 3. Has an impact evaluation been conducted from the strands of capacity development initiatives (mentoring, courses, webinar)- could we have sight of it?**

Impact evaluation of the mentoring program is reflected in this commentary piece published in Health Policy and Planning journal - https://academic.oup.com/heapol/article/35/Supplement_1/i4/5960432

- 4. From the report '*HPS research, education and decision-making capacity needs, assets and opportunities–HSG member survey findings (September 2020)*' is there an action plan- can we have sight of it?**

No action plan has been prepared for public dissemination.

TRAVEL

- 1. During the contract which activities would the HSG expect to be conducted onsite (considering travel restrictions) and is that Geneva?**

The process will be virtual and therefore no travel is expected.

PROCESS

- 1. References: client name and contact information for you to approach or a written reference from the client (Are there particular areas you would like the reference to cover, format or template)**

A written reference is preferred. The client may be contacted if further information is needed.

- 2. The timeline would be four months from contract execution to the end of November, instead of five. Is this acceptable?**

This can be an element of the workplan proposed as part of a candidate submission.

- 3. How has COVID affected your vision for convenings? Will the project be intended to be virtual throughout?**



Yes, the process will be virtual.

4. Please confirm that all deliverables and all communications will be in English.

Yes, all deliverables and communications will be in English.

5. Please confirm whether all meetings, interviews, focus groups, consultation sessions etc can be performed remotely or whether some will be required in person. If any are required in person then please confirm the quantity and likely location of such interactions.

This is confirmed.

6. Is the process envisioned to be primarily board-driven, member-driven process or a combination of both? What level or depth of consultation is expected given the scale of membership?

The process will be both board and member-driven. It will be up to the Consultant to propose the level and depth of consultation with each stakeholder group.

7. Does the contract constitute a labour contract, a cooperation agreements or a contract just to finance the project?

A service contract between HSG and the Consultant will be formed.

8. Will HSG have reserved rights over the proposal draft?

No, HSG will not hold reserved rights over the proposals, however, all proposals received will be confidentially stored (for auditing purposes and will not be publicly shared).

9. Will there be a predetermined schedule of meetings at which the consultant is required to attend?

The Consultant will propose and work with the Secretariat to schedule the meetings.

10. What work experience is required? Would academic experience only in strategic planning, governance and project management be considered?

As per the RFP, the Consultant will be expected to demonstrate the following in the proposal:

- Experience in strategic planning and facilitation with non-profit and membership organizations, including knowledge and experience related to board governance
- Highly developed project management skills
- Familiarity with HSG and experience and knowledge related to global health, health systems policy and research, public health, or related field would be an asset
- Experience in working in Low- and Middle-Income Countries or international organizations would be an asset

11. Can references and work samples required please be clarified?

References: A written reference is preferred. The client may be contacted if further information is needed.

Work samples: Provision of two examples of strategic plans developed by the Consultant that are publicly available and/or relevant deliverables that show their expertise in delivering in strategic initiatives.

12. Can the proposal format be in Microsoft? Is there a preference for vertical vs. horizontal presentation?

There is no preferred format.

13. Does HSG offer an ethical and intellectual property guarantee to the bidder in the event their proposal is not selected?

Yes. All proposals will be confidentially stored for auditing purposes and will not be publicly shared.

- 14. Virtual v. In-person, and technology: Do you have a preferred technology platform for virtual meetings? Given both the ongoing COVID-19 pandemic and the global nature of your organization, we assume the majority - if not all – of this project would be completed virtually. As an Ontario-based firm, what, if any, elements of this project would you prefer be completed in person (assuming such gatherings are permitted under federal and provincial health guidelines and strictly adhering to all public health guidance)?**

The process will be virtual and the preferred technology for virtual meetings is Zoom.

- 15. You asked for samples of previously developed Strategic Plans. As you know, it is always a team effort and / or for organizations where “the names” are not mentioned. For example, we work closely with the Ministry of health and are part of their strategic plan development process, yet, our names are not mentioned in the final document as it is the ministry document. Then how to present samples of work?**

In this scenario, we expect candidates to highlight their contribution to the previously developed plans.

- 16. The work we did on Strategic Planning is not in English. Would this be an obstacle for presenting a sample? We are bilingual but the documents we have are not in English.**

Work samples prepared in other languages will be accepted, however, the HSG strategic planning work and work products will be expected to be conducted and produced, respectively, in English.

TEAM AND SCOPE

- 1. Does this entail a full-time or part time commitment and is work exclusivity required as part of the process?**

We expect the Consultant to determine required resourcing.

- 2. Will it be in the consultant’s scope of work to travel internationally as part of exercise?**

This is not part of the scope of work.

- 3. Can a team of individual consultants, each with key areas of expertise and responsibility (finance or environmental analysis, for example), be formed to support the development of the Strategic Plan?**

We expect the Consultant to determine how to shape the team that will support the development of the Strategic Plan.

- 4. Can team members be based in different countries? Is there a maximum amount of team members permitted to be part of the process? Can team members be brought in during different stages of the project? How is remuneration determined for different team members**

We expect the Consultant to propose the approach in their proposal.

- 5. Are all the names of team members expected to be included in the proposal?**

The team members to be involved with the project as well as their role and experience are expected to be included in the proposal.

- 6. We notice your website materials and RFP are in English. Is this your preferred language of communication for the project and strategic plan documents? Are there other languages you wish for the strategic plan to be translated into? If yes, does HSG have in-house capacity for translation or would that be an expense and task of your consultants?**

All deliverables and communications will be in English. No translation into other languages is expected at this time.

- 7. Would you prefer for graphic design to be done in-house, or shall we include this in our costing?**

We expect the Consultant to include this activity as part of the budget.

- 8. Would you prefer for any of the following elements to be included in the quoted budget and project scope? Strategic planning video: Communications plan to support distribution? Development of evaluative dashboard and tools. We would include identifying metrics as part of the development of a measurable strategic plan. We are wondering if you'd like further assistance to develop the tools for measuring these indicators and a dashboard for monitoring progress. Implementation support?**

It is up to the Consultant to propose any additional elements with associated costing.

- 9. Are the chances to win higher for a company rather than individuals?**

No, this is not the case.

BUDGET

- 1. Please clarify the currency of the \$20-40k budget range (i.e. US or Canadian dollars).**

The currency is US dollars.

- 2. Please clarify if the budget range is inclusive or exclusive of expenses or any applicable taxes.**

The budget range is inclusive of expenses or applicable taxes.

- 3. Is the budget stipulated intended to cover all expenses connected to the project – project team member time, technical advisory, travel, field research, etc?**

Yes, the budget range is inclusive of all costs.

- 4. Is the project co-financed by other entities?**

No, the project is not co-financed.

- 5. What would be the consultant's estimated out-of-pocket expense be throughout the project period?**

It is up to the Consultant to determine out of pocket expenses.

- 6. Will a general budget be accepted in the proposal as the project details and feasibility study would inform a more detailed budget breakdown?**

A general budget is required at this time, and it may be adjusted within the total proposed cost at the time of submission of the initial plan.

- 7. We note your outlined budget is \$20,000 - \$40,000. As you are hosted by the Canadian Society for International Health and based in Ottawa, are we correct to assume the only associated taxes are Canadian taxes?**

Associated taxes will depend on where the Consultant is based.

- 8. What would differentiate a project to be valued at the upper limit of your budget range rather than the lower limit of the range?**

Total proposed cost is one of the evaluation criteria. Consultant selection will be made on the basis of the best overall value for the product and "fit" with HSG.



The process/performance of the consultant will be monitored by the HSG Secretariat. The Secretariat will serve as a conduit between the consultant and the SPWG, and facilitate outreach to the HSG membership.

The selected consultant is expected to operate professionally and deliver high-quality tasks and products on time and within budget.