



The Global Fund
To Fight AIDS, Tuberculosis and Malaria



**Organisation of
Eastern Caribbean States**



HIV/TB Elimination Project (HTEP)

Terms of Reference

for

Technical Specialist - Health Data and Informatics (TS-DHI) Consultant to Support the HIV/TB Elimination Project

Principal Recipient (PR): Organisation of Eastern Caribbean States

Title of Program: HIV/Tuberculosis Elimination Project

Terms of Reference

1. Program Background, Audit Structure and Description of Entities

1.1. Program Background:

1. The OECS Commission was established by the 1981 Treaty of Basseterre. The 1981 Treaty was replaced in 2010 with a Revised Treaty of Basseterre, creating an economic union which is an agreement between countries where barriers to trade are reduced or removed for a single market with a customs union. It is comprised of 7 Member States and 4 Associated Members.

The objectives of the Commission, as defined in Article 4 of the Treaty, are: cooperation among the Member States and at the regional and international levels having due regard to the Revised Treaty of Chaguaramas and the Charter of the United Nations; maintaining unity and solidarity among the Member States and the defense of their sovereignty, territorial integrity and independence; assist Member States in the realization of their obligations and responsibilities to the international community; to seek to achieve the fullest possible harmonization of foreign policy among Member States; to establish the Economic Union as a single economic and financial space; to be an institutional forum to discuss and facilitate constitutional, political and economic changes necessary for the successful participation of Member States in the regional and global economies.

The OECS Commission is the principal administrative organ and is headquartered at Morne Fortune, Castries, Saint Lucia. In addition, there are offices located in Geneva, Brussels, Morocco, Commonwealth of Dominica and Toronto.

The OECS Commission is the Principal Recipient (PR) of a grant from the Global Fund to Fight AIDS, Malaria and Tuberculosis and is responsible for the implementation of the HIV/TB Elimination Project (HTEP) in Antigua & Barbuda, The Commonwealth of Dominica, Grenada, St Kitts & Nevis, Saint Lucia, and St. Vincent and the Grenadines. This project aims to address the main drivers of the HIV infection especially in marginalized populations, such as, men who have sex with men, female sex workers, and transgender persons and, to improve the systems needed to deliver innovative HIV/TB prevention, care and treatment services. The project focuses on providing capacity building for healthcare providers and community partners, the procurement of health commodities (condoms, antiretroviral medications, testing supplies, etc.) and the strengthening of laboratories and information systems that support the HIV/TB and related programs in participating countries. Activities are also included to address human rights and gender-based barriers that impede access to HIV/TB, and related services.

One of the key priorities of the HTEP project is to ensure that countries have standardized access to high quality programmatic data so that activities to address gaps in the HIV/TB response are evidence-based and targeted. To achieve this objective a cloud-based electronic Case-Based Surveillance (eCBS) system was implemented in the last cycle of the grant and in the current cycle, this system will be handed over to Member States for in-country housing.

Additionally, to assist with long term maintenance and sustainability, training/capacity building will be provided to key staff within the Ministries of Health of participating countries. For this purpose, a Consultant (eCBS Consultant) is currently engaged by the OECS Commission to directly work with the Member States to facilitate the handing over and capacity building process.

Under this consultancy, in relation to the eCBS system, the OECS Commission is seeking to engage the services of a Consultant with expertise in health management information systems (HMIS)/health data and informatics, who will service as the Technical Specialist - Health Data and Informatics Consultant, working alongside the HTEP Project Team, the eCBS Consultant and the Focal Points/Technical Leads in the respective Member States, to successfully implement the migration of the system from cloud to in-house hosting.

2. Objectives

The objective of the engagement is to provide short-term technical support to the HTEP Project specifically related to oversight of the implementation of the eCBS system and leading the programmatic reporting requirements to the Global Fund.

The Consultant is expected to meet the following objectives:

- 2.1.1 Provide technical advice and support to the HTEP Project Management Team (HTEP-PMT), Member States and the eCBS Consultant in preparing the hosting environments and migration of the Member States' data from the cloud to their in-house data centers.
- 2.1.2 Create and deliver the quarterly reports and the end of year Progress Update/Disbursement Request (PU/DR) report on a timely basis based on the established calendar of reports.

3. Scope of Works

- The Technical Specialist – Health Data and Informatics (TS-DHI) Consultant will serve as the technical lead and advisor to the HTEP Project Manager on all matters related to the implementation of the eCBS system.
- The Consultant will be expected to provide the Project Manager with all the necessary information to facilitate effective decision making, especially as it relates to allocation of financial resources and approval/acceptance of deliverables submitted by the eCBS Consultant, etc.
- The Consultant will work in close collaboration with the eCBS Consultant and technical leads/focal points to oversee full implementation of the eCBS system and provide guidance/recommendations as necessary.
- The consultant will be expected to lead the development of the programmatic reports for submission to the Global Fund. The specific details are provided below:

eCBS SYSTEM

- Through supervision and technical oversight of the eCBS Consultant and in collaboration with the HTEP Project Manager, ensure that the eCBS activity is implemented in line with the approved TOR and workplan.
- Make recommendations to ensure that the best development and security practices are incorporated into the design of the eCBS system.
- Collaborate with the eCBS Consultant and Member States focal points/technical leads on HTEP technical business requirements, i.e., analyzing and understanding the functional and non-functional requirements of the eCBS and ensure that the requirements are clear, complete, and aligned with the needs of HTEP, including that the change management requirement are met.
- Together with the HTEP Project Manager, attend weekly eCBS technical meetings with the eCBS Consultant and Member States focal points/technical leads.
- Identify technical issues, create and propose technical solutions for implementing efficiency improvements and work closely with the eCBS Consultant to resolve issues identified during the quality assurance process.
- Work with the eCBS Consultant and HTEP on testing, including End to End, the different eCBS software phases.
- Provide oversight and feedback to ensure that the eCBS Consultant develops comprehensive testing strategies to verify the functionality and performance of the eCBS and ensure that test cases cover all aspects of the system.
- Undertake monthly technical reviews to ensure the quality of code and implementations and continuously assess the risks associated with eCBS development and propose mitigating measures.
- Test all eCBS software functionalities and interface with stakeholders, identify technical problems in the functionalities and bugs and guaranty that all functionality problems and bugs identified are fixed before the end of the eCBS consultancy.
- Lead the technical evaluation of the eCBS system and develop technical reports on the eCBS software issue recommendations to the HTEP Project Manager and issue the approval of software on operational acceptance.
- Undertake the final evaluation of the system and submit a technical report on the eCBS software and issue the approval of software declaring it as fully functional.
- Work with the eCBS Consultant and Member States Focal Points to coordinate all planned training/capacity buildings activities in line with the TOR of the eCBS Consultant.

Other Tasks

- Attend weekly HTEP Team meetings.

- Review and provide feedback on quarterly programmatic reports/indicator results submitted by Member States.
- Collate quarterly programmatic reports/indicator results to populate the relevant sections of the annual programmatic progress update report for submission to the Global Fund.

In addition to the points highlighted above, the Consultant may be expected to provide related additional support, which reasonably falls within the scope of work for the eCBS system implementation and/or HTEP programmatic reporting.

4. Deliverables Schedule

Deliverables	Due Date
<p>Output 1: Inception Report and Workplan</p> <p>After initial meetings with the HTEP project team, eCBS Consultant and Member States focal points/technical leads, the Consultant will be required to submit an inception report detailing the approach to the consultancy, including a proposed detailed workplan with key deliverables for implementation, feasible timeline for deliverables, risks and mitigation measure as well as general recommendations.</p> <p>The inception report shall include information on the project background and objectives, as well as the methodology of work with the eCBS Consultant and HTEP in each phase and stage of the development and implementation of the software and the planned schedule of key activities. The Consultant shall describe the expected resources needed as well.</p>	No later than June 30, 2024
<p>Output 2: Review quarterly programmatic reports/indicator results submitted by Member States.</p>	<p>Quarter 2 - July 30, 2024</p> <p>Quarter 3 - October 30, 2024</p> <p>Quarter 4 - January 30, 2025</p>
<p>Output 3: Review and provide feedback on the report submitted by the eCBS consultant on the updated security files with changes to match each country's internal structure along with the configuration script to point to the country's resources. Once satisfactory, make recommendations for the HTEP Project Manager to approve the report</p>	No later July 15, 2024

<p>Output 4: Review and provide feedback on the eCBS Consultant's report on the following:</p> <ul style="list-style-type: none"> ➤ The successful migration of the servers from the cloud vendor to the country's servers. ➤ The successful migration of patient data from the cloud database to the country's database. <p>Once satisfactory, make recommendations for the HTEP Project Manager to approve the report.</p>	<p>No later than July 31, 2024</p>
<p>Output 5: - Review and provide feedback on the eCBS Consultant's report on the documentation on the API created as well as the system template for data input.</p> <p>The system source code as well as the corresponding documentation on the classes' structure, methods, and use as well as the database model and row definitions.</p> <p>Once satisfactory, make recommendations for the HTEP Project Manager to approve the report.</p>	<p>No later than August 15, 2024</p>
<p>Output 6: - Review and provide feedback on the eCBS Consultant's report on the training conducted to include:</p> <ul style="list-style-type: none"> ➤ Training on the use of the templates and its implementation strategies for sustainability ➤ Training on the source codes, files, and the control structure for knowledge on expanding, adding future modules, and configuring APIs for interoperability. ➤ Training on the database structure and export of encrypted records ➤ Train the trainer training on the system, network, application and server administration to include training on the system's security structure and proper security practices. <p>Once satisfactory, make recommendations for the HTEP Project Manager to approve the report.</p>	<p>No later than October 31, 2024</p>
<p>Output 7: Review and provide feedback on the eCBS Consultant's Final Report & technical training manuals to include:</p> <ul style="list-style-type: none"> ➤ CI/CD & version control structure and configuration training ➤ Error coding manual. ➤ Reference manual ➤ IT training manuals 	<p>No later than December 17, 2024</p>

<p>➤ IT technical manuals.</p> <p>Once satisfactory, make recommendations for the HTEP Project Manager to approve the report.</p>	
<p>Output 8: Preparation of indicator results section of the 2024 programmatic PUDR report</p>	<p>No later than February 15, 2025</p>
<p>Output 9: Submission of Monthly Progress Reports -</p> <p>Provide progress and highlight key activities undertaken, successes, challenges, etc. These reports should also include the work done on outputs 1 to 8, for the corresponding months. The final report should also include a summary of all work done under the consultancy.</p>	<p>15th of each month to account for the work undertaken in the previous month (June 2024 – April 2025)</p>

5. Methodology

The Consultant will:

- i. Review and familiarize with the following:
 - Global Fund Grant Agreement.
 - The Updated eCBS Migration Workplan provided by the eCBS Consultant.
 - HTEP Quarterly Reporting template.
 - Any other relevant resources that are useful for the work to be undertaken.
- ii. Consult with the HTEP Project Management Team, eCBS Consultant and Member States Technical teams as necessary to obtain clarification, guidance and inputs where necessary.
- iii. Participate in periodic progress meetings organized by the HTEP Project Manager, the eCBS Consultant and or requested by Member States Technical team to discuss any issues and the progress of the assignment.

6. Available documents and Facilities

The HTEP Project Management Team shall provide the Consultant with access to all relevant project documents and information that are deemed necessary for the successful conduct of the engagement.

7. Duration of the Engagement

The Assignment is expected to be conducted over a 10-month period, from June 2024 to March 2025.

A detailed delivery schedule is provided in Section 4 above.

8. Qualifications, Experience and Skills

- At minimum, a Master's Degree in an area of health information systems or computer sciences, or a related field.
- A minimum of five (5) years' experience with specialisation in health informatics or a related field;
- Knowledge and experience related to best practices in healthcare information management;
- Demonstrated knowledge of health information system design and database management;
- Experience with data collection and analysis in health in developmental or humanitarian contexts;
- Training and experience in project management is an asset;
- Understanding health and/or HIV programs is an asset;
- Experience in monitoring and evaluation would be an asset;
- Advanced proficiency in programming languages and EMR software, such as MySQL, Postgres SQL, PHP, and Epic;
- Good working knowledge of open-source operating systems to include Linux, as well as SDLC, CI/CD and agile methodologies;
- Strong communication and collaboration abilities;
- Familiarity with the cultural and political context of the OECS region.
- Proven capacity to work with collaborative teams across different locations and with different technical skills;
- Experience and skills in the Microsoft Suite of programmes, (including Microsoft Project, MS Excel, Word) and database programs.

9. Reporting Requirements

The Consultant will report and work under the supervision of the HTEP Project Manager, who will provide oversight and approve all deliverables, to be accepted by the OECS Commission.

10. Responsibility of the PR to the Consultant

10.1 The HTEP project team will provide all necessary information relating to the activities which will enable the Consultant to adequately undertake the assignments listed in section 4. above.

10.2 The HTEP PMT shall facilitate meetings between the Consultant and the external

auditor, The Global Fund, the Local Fund Agent (LFA) and Sub-Recipients and any other parties necessary.

11. Payments Schedule

The Consultant will be compensated based on the below payment schedule, upon the review and approval of the deliverables by the HTEP Project Manager.

Deliverable	Percentage of Payment
Inception Report and Workplan and Submission of Monthly Progress Report for June 2024	15%
Monthly Progress Report for July 2024 (To include the relevant aspects of Outputs 2,3 and 4)	10%
Monthly Progress Report for August 2024 (To include Output 5)	10%
Monthly Progress Report for September 2024	5%
Monthly Progress Report for October 2024 (To include the relevant aspects of Output 2 and 6)	10%
Monthly Progress Report for November 2024	5%
Monthly Progress Report for December 2024 (To include Output 7)	10%
Monthly Progress Report for January 2025 (To include the relevant aspect of Output 2)	10%
Monthly Progress Report for February 2025 (To include Output 8)	10%
Monthly Progress Report for March 2025 including the Final Report	15%

GUIDELINES FOR SUBMISSION OF EXPRESSIONS OF INTEREST

Individual Consultants are invited to indicate their interest in providing the services. Interested Consultants must provide information on their capability and suitability to undertake the assignment.

Consultants interested in undertaking the prescribed Services are to email an Expression of Interest (EOI) to include:

1. Information on the Consultant's qualifications to perform the services, experience and competence relevant to the assignment, including a Curriculum Vitae.
2. A concept note on the planned framework for undertaking the assignment and a breakdown of the number of days required for each task (*as per Table 4*).

Expressions of Interests submitted should not exceed 30 pages.

The Consultant shall bear all costs associated with the preparation and submission of his/her Expression of Interest.

The OECS is not bound to accept any Expression of Interest, and reserves the right to annul the selection process at any time prior to contract award, without thereby incurring any liability to the Consultants.

An electronic copy of the Expressions of Interest should be submitted by **May 21, 2024**, addressed to:

At the following email address:

procurementbids@oecs.int

copied to: roger.welch@oecs.int

The email submissions should include the name and address of the Individual Consultant and shall be clearly marked in the subject line as ***“Expression of Interest – Technical Specialist - Health Data and Informatics (TS-DHI) Consultant to Support the HIV/TB Elimination Project”***.

An Individual Consultant will be selected in accordance with the Consultant's Qualifications (CQS-IC) Selection Method as detailed in the procedures set out in the Procurement Manual of the OECS, dated November 2013 revised June 2017.

The criteria to evaluate the Expressions of Interest received in relation to this assignment will include:

- Technical competence in undertaking the assignment;
- Academic qualifications;
- Experience in undertaking similar assignments; and
- Planned framework submitted for undertaking the assignment.

The Expressions of Interest will be evaluated and the Individual Consultant with the most relevant experience, qualifications and technical competence will be selected and requested to submit a fee proposal, which will be the basis for negotiations leading to a contract.

It is expected that the services will be conducted from *June 2024 to April 2025*, in keeping with the terms outlined in the Reporting Requirements above.