

DIGITAL FINANCIAL SERVICES ON HEALTH OUTCOMES AND HEALTH SYSTEMS

Scope of Services

Situation Overview

The cost for accessing health services can have dramatic and negative impacts on individuals, families, and communities already struggling to meet their financial obligations. Globally, health-related financial shocks are driving 100 million people into extreme poverty conditions. These catastrophic hardships could be mitigated if enough financial protections were available such as prepayment (savings) and pooling of resources (insurance) for health. Digital financial services (DFS) have the potential to be a valuable mechanism to provide these financial protections while at the same time strengthening health system performance.

To better understand the opportunity presented by DFS, Digital Square seeks to build on existing work through a rapid assessment, resulting in the creation of country case studies. This research will explore the role that DFS could play in the context of efforts to advance financial protection and support improved health system performance across low-resource settings. The assessment will also seek to understand the factors (beyond digitization) that make these solutions successful and the role that digitization can play in enhancing and leveraging these factors. Ultimately, this scope of work will result in:

- ▶ an initial understanding, and set of hypotheses, on the opportunity of DFS for health;
- ▶ three country case studies exemplifying research results and identifying operational realities on the ground;
- ▶ potential areas for further, future in-depth research or action; and,
- ▶ an initial community of practice for taking this work forward.

Vital Wave is a professional-services firm specialized in the design and implementation of digital solutions to address large-scale development issues across low- and middle-income countries. For 14 years, the firm has worked with multinational technology firms, aid agencies, large foundations, and national governments on the application and scale of digital health as well as digital financial services interventions. This has included comprehensive assessments, large-scale implementations in both digital health and digital financial services, and field-building research and thought leadership. Vital Wave is also a technology agnostic firm, enabling a neutral perspective to its assessment results as well as the ability to convene multiple stakeholders across the digital development field to work together towards a common goal.

It's partner for this scope of work, Geopoll, has conducted nearly 7 million surveys each year for development and multilateral clients. These surveys have been executed in 45 countries using multiple mobile and in-person data collection modes including two-way SMS, live calls (CATI), IVR, mobile web, and face-to-face approaches. GeoPoll operates across Africa with deep capacity in countries such as South Africa, Nigeria, and Kenya. GeoPoll's largest office is in Nairobi, where nearly 60 technical and research staff reside supporting a vast array of clients including the UN, the World Bank, USAID, the Bill and Melinda Gates Foundation, MasterCard, and others.

Engagement Scope

Over a period of 12 weeks, Vital Wave will employ a mixed-methods approach to conduct this landscape assessment. The firm will collect information through key stakeholder input and secondary and primary research, including desk-based interviews with subject matter experts and private sector partners, coupled with mobile-phone-based surveys with health care workers, patients, and community members in up to three countries. This approach, combined with a stakeholder convening to aid in synthesis and to establish a community of practice, provides an efficient yet grounded way to derive a view of the current landscape and explore certain key questions. It also ensures that any recommendations on areas of future in-depth research or implementation will be actionable as well as impactful and that key stakeholders will be bought into the final outcomes.

It should be emphasized that research will consider user needs and experience as well as a high-level system view, which will have an impact on the realities of implementation. A high-level system view, as well as an assessment on the direction that both the healthcare and financial services systems are taking at the country level, will provide a clear sense on a realistic scope for implementation in the near future. This includes understanding the capacity at the country level for management of digital programs and interventions.

Through this process, Vital Wave will be able to evaluate the success and impact of relevant implementations to date, identify gaps and challenges, and design recommendations on areas to focus for future research or action that will have buy-in and support from the wider fields. Furthermore, this approach can provide a concrete foundation for the realization of a robust community of practice to execute against prioritized outcomes. This engagement will result in:

- ▶ identification of key citizen needs, and burdens related to health financing, and the interplay of digital financial services and health service delivery;
- ▶ multi-layered assessment and analysis of DFS implementations in the context of universal health coverage;
- ▶ identification of key factors (digital and non-digital) that contribute to their success to inform implementation considerations;
- ▶ stakeholder alignment on potential opportunities to leverage DFS for financial protection and HSS at scale;
- ▶ establishment of a Community of Practice (COP) dedicated to further exploration of this subject area; and
- ▶ final report, including set of case studies, and supporting materials for socialization across key stakeholders.

Ultimately, the assessment will result in a set of hypotheses, grounded in research, on the biggest citizen needs in terms of DFS for health and potential opportunities to address them. This will also include a research agenda to help drive potential areas for future in-depth investigation or action amongst the development community.

Vital Wave's proven methods of assessment, analysis, and strategic synthesis will result in valuable frameworks and distilled insights to inform Digital Square's strategic next steps. For this work, the firm will draw on its in-depth understanding of national digital health and DFS implementations, extensive in-country research on the interplay between DFS and health-service delivery, its strong network (including donors, digital implementers, and the private

sector), management of communities of practice. Vital Wave will employ an iterative approach to research and analysis to derive a deep level of contextualization and nuanced results.

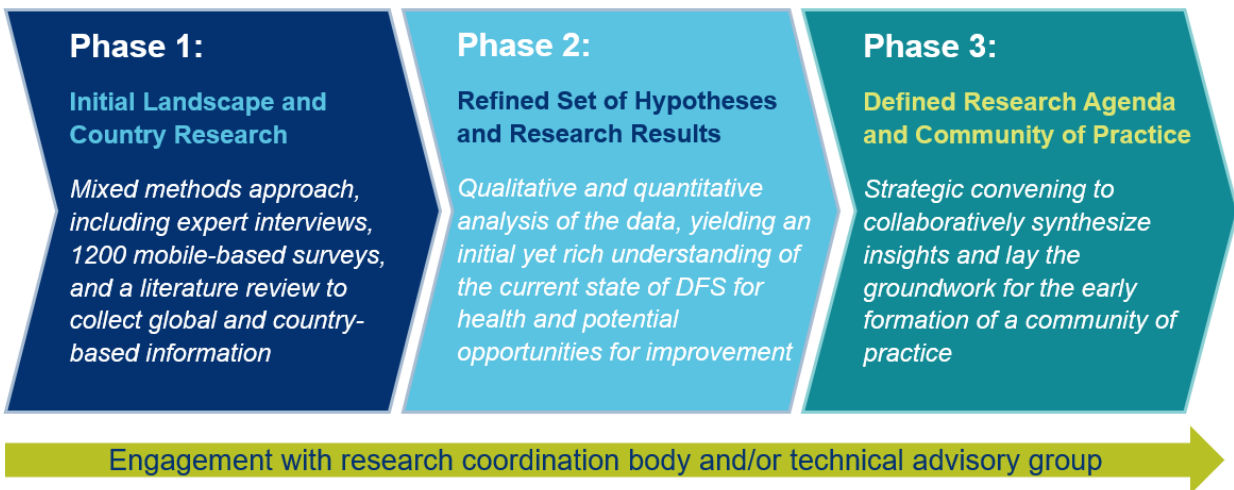
In addition, where appropriate, Vital Wave will apply a gender lens. As a small women-owned business, the firm is extremely thoughtful in integrating a gender lens into its project or research design. This means that it focuses on various aspects such as systemic or cultural barriers, mobile access versus utility, and the role of men. The firm is also judicious in whether to apply a gender lens to its work, for at times, it may not be appropriate given the context or project goals.

Lastly, and equally as important as the assessment itself, Vital Wave will ensure proper stakeholder engagement and socialization throughout the project process. Stakeholders will be identified in consultation with Digital Square and USAID, and will include subject matter experts in digital health, DFS, and overlapping areas. This will include engagement with the research coordination body or technical advisory group throughout the project process.

First, stakeholder inputs will be sought during the interview process. Subsequently, they will be a part of the process of synthesizing insights, as appropriate. This will enable the incorporation of an array of perspectives and experiences in the articulation and synthesis of the landscape assessment. It will also accelerate the buy-in process of actionable next steps. As the final output, Vital Wave will create a concise, publication-ready report and derivative materials (e.g., a summary presentation) for broader distribution. This will include easy-to-digest key messages for the target audience.

Approach by Phase

Vital Wave will use a mixed-methods approach across three phases, captured by this figure:



Phase One: results in rich and grounded insights to drive hypotheses on challenges and opportunities.

Vital Wave will employ a number of research methods to collect information across different country contexts. First, it will build upon its own resident knowledge through a literature review, identifying relevant DFS interventions in the context of health programs (specifically related to financial protection and HSS). For instance, the firm conducted in-depth research in Nigeria on the opportunities to leverage DFS for healthworker salary payments as a means of reducing absenteeism and improving the delivery of health services in rural health facilities. In parallel,

Vital Wave will conduct interviews with five-to-seven global subject matter experts from across its vast network in both fields.

Informed by the results, the team will design and implement mobile-phone based surveys in three countries (total n=1,200), targeting healthcare providers, patients, and community members. The firm's mobile survey research partner GeoPoll has considerable experience using two-way SMS surveys to engage target populations based on specified demographics. This approach allows anyone with a basic mobile device to participate without need for a smartphone, internet connectivity, or a balance on their SIM card. In particular, the mobile penetration in specific countries (e.g., Nigeria, Kenya and South Africa) exceeds 85%. This combined with GeoPoll's experience and ground presence, allow for a quick result.

Note: the data collection phase that GeoPoll will support can be conducted in very short order due to the mobile nature of the survey approach. Most two-way SMS surveys take less than two weeks to implement.

Therefore, GeoPoll will work with Vital wave to determine the target respondents based on screening criteria in the mobile survey (e.g., are you a healthcare provider, patient, and/or community member). Based on these qualifying characteristics GeoPoll will then direct a series of short SMS-based questions to eligible respondents to collect key quantitative data to be shared with Vital Wave. In these countries, GeoPoll has access to millions of mobile numbers through its relationships with the mobile network operators and will have no difficulty accessing 400 eligible respondents in each geography.

Vital Wave will also elicit responses from private sector providers. These surveys will investigate multiple aspects of the user experience in accessing health care, paying for services, and relevant impacts. The firm is positioned to quickly execute these surveys, with networks already established globally. This means that the rapid assessment through the literature review, as well as input from Digital Square and the research coordination body, can be taken into account in identifying countries for research and the case studies themselves.

Phase Two: results in a set of hypotheses and research results to validate and refine.

The team will conduct both qualitative and quantitative analysis of the data, yielding an initial yet rich understanding of the current state of DFS for health and potential opportunities for improvement. This information will tease out areas for consideration in implementation, not just about the potential benefits. The realities of a particular country (as found in Phase One research) regarding their financial and health systems will be analyzed.

This analysis will support convening discussions and deliverable development in Phase Three. In parallel, the firm will also design and prepare for the multi-day stakeholder convening. In preparation, Vital Wave will conduct a robust process that includes one-on-one interviews, iteration on the agenda and discussion frameworks, and finalization of the pre-workshop reading materials. Pre-read materials may include results from the mobile surveys and other outcomes from the Phase One research.

Phase Three: brings stakeholders into the process of synthesizing insights and lays the groundwork for the early formation of a community of practice.

Vital Wave will design an event that is interactive and action oriented. It should be noted that the design of the convening will integrate human-centered design principles as well as global

standards such as the [Principles for Digital Development](#), the [Donor Investment Principles](#), and [Level One Guidelines](#). The benefit of this approach will be to achieve a wider range of objectives in an efficient and community-driven manner. This means that the broader community will be bought into the results of this scope of work, leading to a higher probability of continued action and implementation going forward.

A key objective of the workshop will be to validate areas of alignment and agree upon impactful and collaborative opportunities moving forward. This could be around specific areas for further in-depth research or other actions that the community can pursue. Vital Wave will draw on its extensive experience facilitating such events as well as share the research and case studies from the first two phases of work. Upon completion, Vital Wave will synthesize and integrate the workshop outputs into the final report. An accompanying slide deck will be created that communicates key messages and soundbites for the target audience in an easy-to-digest and visually engaging manner. Lastly, the firm can create a collaborative workspace and supporting materials to begin the formation of a community of practice. For instance, Vital Wave conducted a similar process for the [Digital Solutions for Malaria Elimination Community of Practice](#) that focuses on the design and implementation of mobile tools for malaria surveillance across multiple geographies.

Company Capabilities

Vital Wave addresses large-scale system issues through digital technology in LMIC countries. The firm is a recognized leader in designing and implementing digital health and financial services solutions at national scale. In addition, Vital Wave regularly coordinates across sectors and manages partnerships to facilitate success.

Digital Health Expertise: Since 2008, Vital Wave has designed solutions, created tools and common goods, led national implementations, and provided thought leadership in digital health for low- and middle-income countries. This work has extended across multiple areas of health, including vaccines, malaria, HIV, tuberculosis, polio, universal healthcare, maternal and child health, and neglected tropical diseases. The firm's in-depth engagements in digital health include geographies such as Ethiopia, Malawi, Zambia, Tanzania, Uganda, Burkina Faso, South Africa, Nigeria, India, and Mexico. Within digital health, Vital Wave regularly conducts in-depth and strategic assessments. The firm utilizes a holistic ecosystem approach to ground its results in influencing factors. For example, the firm worked alongside the ministries in [Ethiopia and Malawi](#) to improve information systems and increase the use of data in health.

Digital Financial Services: Vital Wave also brings years of developing-country experience in digital financial services. The firm's end-to-end involvement ranges from market research to solution design, build, and implementation. Vital Wave has worked extensively with a variety of stakeholders including consumers, bulk payers, agents, MNOs, value added service providers, governments, international development organizations, and private-sector partners. The firm has a deep knowledge of the range of factors that influence the usability, and accessibility of DFS. For example, Vital Wave assessed the [marketplace of digital financial services](#) across Africa, which directly informed the creation of [the ADFI](#). In Somalia, Vital Wave designed and implemented a digital payments system for beneficiaries of humanitarian relief efforts and civil servant workers.

Cross-Sector Pollination and Community Engagement: Vital Wave works across several industry areas so best practices, lessons learned, and assets from a diversity of sectors are incorporated in every project. This cross-pollination leads to more robust solutions with greater impact. For example, in Nigeria, Vital Wave performed a comprehensive landscape assessment of mobile-based [payments for health and financial services](#), leading to a better understanding of use cases and directions for future solutions-based interventions. In addition, Vital Wave manages and facilitates interaction between stakeholders across the entire digital-for-development field. The firm's design and facilitation of strategic convenings have resulted in the establishment of global alliances (e.g., Digital Impact Alliance (DIAL)), new public-private partnerships, and guidelines for the development community.

Development of Common Goods: The firm also regularly contributes to the common goods space. This includes the development of the [Beyond Scale](#) guide and facilitating the creation of the [Principles of Donor Alignment for Digital Health](#). Another example within health is the firm's work on [mobile tools for malaria surveillance](#). In digital financial services, the firm conducted end-user research to identify barriers to adoption, which contributed to the development of the [Level One Guidelines](#). This is complemented by the firm's ability to produce compelling material for multiple audiences.

Estimated Project Timeline

The project is projected to occur over a twelve-week period. Table A, below, provides a weekly overview of the project by key phase along with deliverables and the estimated schedule of delivery.

Table A: Estimated Project Timeline and Deliverable Overview

Phase	Week											
	1	2	3	4	5	6	7	8	9	10	11	12
Phase One	D1											
Phase Two								D2				
Phase Three									D3			D4

- ▶ *D1: Project inception presentation (8-10 PowerPoint slides) and kickoff meeting*
- ▶ *D2: Preliminary research results and pre-read materials (e.g., case study results) for workshop (~15 PPT slides)*
- ▶ *D3: Facilitation (two-to-three days, exact length and timing TBC)*
- ▶ *D4: Final report, three case studies, and slide deck detailing recommendations and research agenda (15-20 Word pages including case studies, ~20 PowerPoint slides), platform for Community of Practice (e.g., collaborative workspace)*

A Note on Engagement Length

Although Vital Wave offers projects on a flat-fee basis, the firm bases the estimated cost on a standard set of hours for different types of activities. These estimates have been evaluated and refined over its 15 years of experience in conducting similar work.

The hours that Vital Wave estimates to accomplish this scope are broken out by phase below. The duration of the project itself is determined by the distribution of those hours across team members and by the percentage of total time they are dedicating to this project.

Vital Wave has combined this approach with the typical amount of time necessary for review and input processes with clients and stakeholders, to determine the 12-week timeline. Should Digital Square, USAID and stakeholders require longer periods for reviews and input, Vital Wave is quite open to extending the total project duration to accommodate that process.

Table B: Hours

Phase	Estimated Hours by Phase
Phase One	151
Phase Two	154
Phase Three	261
Total Hours	566

As always, Vital Wave is pleased to work with Digital Square to further refine the goals, scope, and timeline of this project to meet the client's needs.

Team Structure

Vital Wave will assemble a team comprised of experts in digital health, digital financial services, strategy development, and stakeholder management. An Engagement Manager will lead the strategic direction of the project, manage client communications, and ensure the creation of robust deliverables. They will be supported by additional analysts and executive staff who will provide strategic and technical input. All team members will contribute to the final deliverables.

Brooke Partridge, President & CEO / Executive Strategist and Facilitator

Ms. Partridge is a business executive, entrepreneur, and thought leader in the use of digital solutions to address large-scale system issues across low- and middle-income (LMIC) countries. Ms. Partridge has led Vital Wave's role in building the field of digital health in LMICs and has overseen digital health and digital financial services implementations across the developing world. She facilitates the company's bridge from strategy development to implementation and leads multi-stakeholder convenings to highly actionable outcomes. Ms. Partridge regularly works with a diverse range of stakeholders to combine vision and strategy into realizable plans. Ms. Partridge has led the development of Vital Wave's Digital Health Practice and personally shepherded field-building activities in DFS such as the strategic design of the Level One Principles framework for the Gates Foundation. Through these engagements she has created robust investment and programmatic strategies as well as facilitated cross-sector convenings, all of which have been reinforced by her implementation experience.

Brendan Smith, VP of Professional Services / Executive Oversight

Mr. Smith drives the development of strategic insights and the application of its research and analytical approaches in the company's implementation work. Mr. Smith brings years of expertise in digital development and has led many of the company's highest profile engagements. This includes in-depth assessments and the creation of thought leadership across multiple industries including health, financial services, education and agriculture. For instance, he led the firm's work to implement a bulk payment system in Somalia and a health services call center in Nigeria, as well as conducted extensive field research to understand opportunities to improve DFS mechanisms in Tanzania and Bangladesh. He also worked across multiple stakeholders to create a report detailing how governments can further institutionalize digital into their national health systems. Lastly, he is expert at supporting facilitations, such as a recent workshop with the Bill and Melinda Gates Foundation and its data use grantees.

Liz Grubin, Director of Professional Services / Engagement Manager

Ms. Grubin's work has focused opportunities to apply digital tools for health system strengthening in the context of LMIC countries. She regularly works with clients to develop strategies to identify and apply the optimal intervention based on country context and user needs. This leads to the creation of new programs or initiatives, such as catalytic funding mechanisms, or to the design and implementation of specific digital solutions. She led Vital Wave's cross-sector work in Nigeria, investigating the opportunity to leverage DFS in addressing absenteeism among rural healthcare workers. Ms. Grubin also oversaw the DFS market assessment focused on all of Africa, which led to the creation of a robust investment mechanism to support DFS ecosystem strengthening. Prior to Vital Wave, Ms. Grubin served as Director for international development NGOs (Impact Carbon) and project manager for management consulting firms (ICF International).

Alice Kehoe, Senior Analyst / Lead Analyst

Ms. Kehoe brings extensive experience in digital financial services, with a focus on research, framework creation, due diligence, and implementation of inclusion-focused projects. For instance, she recently worked with the CDC Group, a UK-based finance institution, on the development an impact investment thesis which included various financial services models (e.g., fintech, microfinance, affordable housing finance). This is bolstered by her work in designing and implementing projects to promote financial literacy and enhancing customer-centric practices. Prior to this, Ms. Kehoe focused on measuring social impact, which means that her development work is complemented by a focus on return on investment and ensuring evidence generation. Ms. Kehoe has a MSc from the London Business School of Management, and a B.A. from King's College of London.

Derek Treatman, Director of Technology Solutions / Digital Health Advisor

Mr. Treatman is an engineer and digital-for-development specialist with extensive experience adapting digital technologies to meet the needs of diverse stakeholders. His work in complex, resource-poor settings has focused on applying readily available technologies to strengthen national systems, particularly in health. At Vital Wave he supports governments and NGOs as they implement and optimize major initiatives. He also regularly contributes to the creation of common goods and manages cross-sector partnerships as well as communities of practice, such as the digital solutions for malaria elimination community of practice. In addition, Mr. Treatman has contributed to several Vital Wave facilitations focused on digital health that informed key pain points, opportunities to address them, and identified interventions. He also aided in the multi-country facilitation for the creation of the Digital REACH Initiative, a regional initiative focused on expanding digital health across the East African Community.

Leah Gatt, Director of Professional Services / Cross-Sector Advisor

Ms. Gatt brings years of experience in research, analysis, and on-the-ground implementation, in both digital financial services and health. For digital financial services solutions, she has managed country teams, vetted local project partners, worked directly with aggregators and mobile network operators on processes and pricing, created useful tools for stakeholders, and documented practices. She has also worked with local organizations in tailoring mobile money toolkits and training processes to their organization. In terms of health, Ms. Gatt led the research and development of the roadmap, strategic plan, and costing for the Digital REACH Initiative – a regional initiative in the East African Community focused on the use of digital to improve health outcomes. Prior to joining Vital Wave, she worked with the European Commission's Department of Agriculture and Rural Development. Ms. Gatt also conducted research with Lagos State Government with high-level state officials and taxpayers, where she advised the government on issues of taxation and legislation.



APPENDIX A: PAST PERFORMANCE REVIEWS

ATTACHMENT J.10 - PAST PERFORMANCE QUESTIONNAIRE

SECTION A: (To be filled by the Offeror)

Offeror's Name: Vital Wave

Was the Offeror the Prime or Subcontractor on the project: Prime

Project Name: Integrated Digital Payments for Health and Financial Services in Nigeria

Project Scope/Description: An integrated digital payments system in Nigeria could lead to greater synergy between mobile health and mobile financial services. Stronger integration would create greater efficiencies, increase the social and economic impact of various development programs, and better serve program beneficiaries. Vital Wave was engaged by a global foundation to perform a comprehensive landscape assessment of mobile-based payments for health and financial services in Nigeria. The company analyzed the value chain to discover potential cost efficiencies, opportunities for gains in health outcomes, and areas of risk. This included mapping the payment flows (or salaries) of government health workers all the way from distribution to disbursement to identify bottlenecks. Vital Wave also researched the challenges that health workers were having in accessing their salaries (e.g., traveling to the bank to collect the funds, machines running out of cash, cost of transport to get to town). This research helped to understand the challenges facing health workers as well as make recommendations on improving access to their salaries. Lastly, the firm also spoke to local solution providers (e.g., MNOs, payment providers, banks) to further identify the landscape of possible solutions. Ultimately, this project led to a better understanding of use cases and provided direction for future solutions-based interventions.

Primary Location (s) of Work: United States, Nigeria

Period of Performance: November 2014 – December 2015 Dollar Value: Confidential

Name of Person: David Lubinski Phone No.: +1 (206) 770 2318 | David.Lubinski@gatesfoundation.org

Employer: The Bill & Melinda Gates Foundation
Contact's Role or Knowledge of the Project: Client

Other references available:

Ken Warman, Formerly the Bill & Melinda Gates Foundation (note: he is now at KJW Consulting), +1 (206) 739 6571 | Kwarman7@gmail.com

**ATTACHMENT J.10 - PAST PERFORMANCE QUESTIONNAIRE****SECTION A: (To be filled by the Offeror)**

Offeror's Name: Vital Wave

Was the Offeror the Prime or Subcontractor on the project: Prime

Project Name: Digital Payments for Civil Servants in Somalia

Project Scope/Description: In partnership with the World Bank, Beyonic, and Alpha Fintech, Vital Wave is building an online platform that will allow the Central Bank of Somalia to pay salaries to Somali civil servants through any one of the country's mobile money providers. This bulk payment platform may eventually be extended to other use cases, including social safety net payments to households affected by natural and manmade disasters. Over the long term, the platform will be connected to a new Somali central payment switch, which will provide the additional benefits of payment traceability and improved adherence to international know your customer (KYC) standards in Somalia. Vital Wave's role throughout this engagement has been to manage the consortium of partners, document platform business and technical requirements, oversee the implementation, and support the operationalization of the transition to digital payment at the Central Bank through training and the creation and institutionalization of processes and standard operating procedure documentation.

Primary Location (s) of Work: United States, Somalia

Period of Performance: 2018 – ongoing Dollar Value: Confidential

Name of Person: Tim Kelly Phone No.: +1 (202) 458-9839 | tkelly@worldbank.org

Employer: The World Bank

Contact's Role or Knowledge of the Project: Lead client and beneficiary

**ATTACHMENT J.10 - PAST PERFORMANCE QUESTIONNAIRE****SECTION A: (To be filled by the Offeror)**

Offeror's Name: Vital Wave

Was the Offeror the Prime or Subcontractor on the project: Prime

Project Name: Roadmap, Strategic Plan, and Costing for the Digital REACH Initiative

Project Scope/Description: Vital Wave worked closely with the East African Health Research Commission (EAHRC) to create a roadmap that details the plan for coordinating regional action to improve health outcomes across the East African Community (EAC). The roadmap was developed through a region-led process, facilitated by Vital Wave. A series of in-depth stakeholder consultations were held, with collaboration and input from representatives of each of the EAC Partner States. The roadmap was approved by the EAC Sectoral Council of Ministers of Health in November 2017. Vital Wave then continued to work with the EAHRC on the creation of a strategic plan which details the specific activities and costs required for the initiative such as creating better policy, harmonization of standards and improved interoperability, development of core shared infrastructure and services and applications, and the building of a strong health and health IT professional workforce across the EAC region. The plan also includes strategic regional and cross-border implementations that benefit the region including telemedicine networks, the establishment of a regional health data cloud and associated architecture and support team, and an early detection surveillance system that will work to identify potential disease outbreaks in the region. For more information, [click here](#).

Primary Location (s) of Work: United States, Tanzania, Uganda, Kenya, Rwanda, Burundi

Period of Performance: August 2017 – February 2019 Dollar Value: \$962,808

Name of Person: Tim Wood Phone No.: + 1 (206) 669 8469 | Tim.Wood@gatesfoundation.org

Employer: EAHRC

Contact's Role or Knowledge of the Project: Lead client and beneficiary

Other references available:

Merrick Schaefer, USAID, +1 (571) 551 7215 | mschaefer@usaid.gov

(Digital Square (PATH) and Knowledge for Health (Johns Hopkins) were fiduciary pass-through agents).



ATTACHMENT J.10 - PAST PERFORMANCE QUESTIONNAIRE

SECTION A: (To be filled by the Offeror)

Offeror's Name: Vital Wave

Was the Offeror the Prime or Subcontractor on the project: Prime

Project Name: Digital Financial Services Inclusion Challenges and Opportunities in Africa

Project Scope/Description: Vital Wave was engaged to assess the marketplace of digital financial services (DFS) across Africa and to identify potential opportunities for ecosystem strengthening and interventions to drive adoption. The market assessment informed the process of designing and establishing a new investment fund. As part of the three phases of the project, Vital Wave conducted primary research in Ethiopia, Egypt, Cote d'Ivoire, and South Africa, meeting with regulators and service providers to explore opportunities for DFS ecosystem strengthening related to regional interoperability, policy requirements, and infrastructure improvements. The firm also collected continent-wide data on the current state of digital financial services, characterized and segmented country markets, and identified opportunities for targeted investments in the East African, WAEMU, and Southern African regions to catalyze the growth of DFS.

Primary Location (s) of Work: United States, Ethiopia, Egypt, Cote d'Ivoire, and South Africa

Period of Performance: April 2016 – September 2016 Dollar Value: Confidential

Name of Person: Sofiane Sekioua | S.SEKIOUA@afdb.org

Employer: The African Development Bank
Contact's Role or Knowledge of the Project: Client

**ATTACHMENT J.10 - PAST PERFORMANCE QUESTIONNAIRE****SECTION A: (To be filled by the Offeror)**

Offeror's Name: Vital Wave

Was the Offeror the Prime or Subcontractor on the project: Prime

Project Name: Characterizing the Global Landscape of National HIS Ecosystems

Project Scope/Description: Vital Wave was engaged to create a comprehensive overview of the global HIS landscape with the purpose of identifying emerging best practices for the creation of sustainable, national eHIS. Initially, the team conducted an extensive analysis of secondary literature on health information and interviews with industry experts. Next, the research team conducted a thorough review of secondary sources for 19 countries, including literature reviews and interviews to capture a basic picture of HIS initiatives in each country. Finally, primary research was undertaken in three countries with notable HIS initiatives: Brazil, India and Zambia. Site visits to these countries provided first-hand information on three initiatives of special significance. The final report looks at the threats to health and the challenges facing health care systems in the developing world. This includes information on the landscape of efforts to specify and create successful HIS at the national level. Lastly, it examines the three countries in depth and reviews the important challenges and opportunities associated with creating an effective HIS.

Primary Location (s) of Work: United States, Brazil, India, and Zambia

Period of Performance: September 2008 – December 2008 Dollar Value: Confidential

Name of Person: Ken Warman Phone No.: +1 (206) 739 6571 | Kwarman7@gmail.com

Employer: The Bill & Melinda Gates Foundation (note: he is now at KJW Consulting)
Contact's Role or Knowledge of the Project: Client

APPENDIX B: CURRICULUM VITAE

Liz Grubin

Liz Grubin's work has focused on the nexus of enterprise development and appropriate technologies across developing countries, with an emphasis on leveraging innovative financing mechanisms to improve sustainability and drive commercial opportunity across various industries. Ms. Grubin regularly works with clients to develop strategies for the application of technology to specific industry areas, such as healthcare and financial services. This leads to the creation of new programs or initiatives, such as catalytic funding mechanisms, or to the design and implementation of specific digital solutions. Her projects have included assessing the application of digital tools and solutions to improve systems and services across the developing world.

Professional History

Vital Wave

San Francisco, CA

Director, Professional Services

November 2014 – present

- Regularly leads projects across industries and services as Engagement Manager. This includes overall day-to-day management of projects, leading the strategic direction of research and analysis, team oversight, as well as client communication.
- Conducted both organizational and multi-country assessments for digital tools including mobile tools for neglected tropical diseases (NTDs), malaria surveillance, and financial services.
- Led work on the ground in Ethiopia for the Data Use Partnership engagement which entailed fostering a culture of data use as well as the design and creation of digital tools for the Ministry of Health.
- Creates robust yet actionable and digestible deliverables for clients as well as aids in their socialization.
- Regularly contributes to strategic convenings and strategy creation on the use of ICT4D for clients.

Impact Carbon

San Francisco, CA

Operations Director

November 2012 – November 2014

- Management of operations for a 21 person 501(c)3 non-profit organization that leverages carbon and social finance to drive access to clean energy technologies for Base of Pyramid communities in developing countries. Responsibilities included oversight of legal, administration, and HR activities.
- Direct management of Business Development team, with extensive experience in client engagement, evaluation of project opportunities, feasibility and risk assessments, and financial modeling. Design and evaluation of programs in Africa, Asia and Latin American, with focus on identification and dissemination of appropriate technologies through commercial channels, leveraging MFI partnerships, novel sales offers, and mobile repayment plans.
- Technical advisor for carbon project development team, driving strategy and rigorous quality assurance and quality control measures across the project portfolio.
- Served as organizational representative during numerous international conferences and workshops, presenting on Impact Carbon's programmatic approach and leading discussions on leveraging carbon and social finance for development.

Project Manager

November 2010– November 2012

- Project manager for portfolio of clean energy carbon projects, adhering to the rigorous standards of the appropriate carbon methodologies and policies.
- Responsible for oversight of entire project development process, including client and stakeholder engagement, budget and team management, design of all project deliverables, project site visits, and management of subcontractors.
- Manage survey design for ongoing project monitoring to ensure accurate data collection, analysis and reporting, as per methodological requirements.

ICF International

San Francisco, CA

Senior Associate

July 2008 –October 2010

- Project Manager for SF Environment's San Francisco Energy Watch program, a \$12 million local government partnership designed to promote energy efficiency in commercial and multifamily properties.



Responsibilities included daily program implementation, budgetary oversight, analysis and approval of retrofit projects, outreach to customers and vendors, and direct reporting to SF Environment and PG&E. Managed 5 staff members.

- Developed corporate carbon inventory for global companies, analyzing multiyear data sets and reporting in accordance with the Environmental Protection Agency's Climate Leaders Protocol. Analysis included assessment of greenhouse gas inventories to advise client decisions for onsite reductions and the purchase of offsets.
- Consulted to SF Environment on design of energy efficiency programs including the Home Performance with Energy Star program and a Heating Systems Retrofit.

Department of Public Works, City of Cambridge

Cambridge, MA

Energy Projects Coordinator

November 2006 – May 2008

- Design and oversight of projects promoting energy efficiency and emissions reduction throughout municipal buildings. Examples include major insulation upgrades, computer power management improvements, and installation of premium efficiency HVAC systems.
- Management of greenhouse gas emissions database and conducted analysis to determine city-wide emissions trends. Created reports to track building and departmental performance.
- Assisted in communications and outreach efforts, including creation of energy awareness campaign and coordinating efforts of various departments. Provided training and support for emissions database.

Sea Education Association

Woods Hole, MA

US Merchant Marine Deck Officer

September 2001 – August 2006

- Deck Officer of 200-ton sail training and oceanographic research vessels operating year-round in the Atlantic and Pacific Oceans, tasked with conducting daily sampling and data analysis for better understanding and promoting ocean sustainability.
- Responsible for safety of ship and crew of undergraduate students, operation of the vessels during technical marine sampling deployments and ongoing communication with ship's captain and officers.
- Educator responsible for teaching coastal piloting, celestial navigation, radar, vessel operations, and ship handling as part of a sustainable oceans-centered curriculum.

Education
Tufts University

Medford, MA

Master of Arts, Urban and Environmental Policy and Planning

May 2008

Bates College

Lewiston, ME

Bachelor of Arts, Environmental Studies

May 2001

Honors, Skills, and Certifications

- Certified: U.S. Coast Guard 500 Ton Ocean Master, Fire Fighting, and Wilderness Medicine
- LEED Accredited Professional since May 2008
- Volunteer with environmental and community focused non-profits: Vida Verde, Soccer Without Borders at Oakland International High School, and the Sister District Project
- Working knowledge of Spanish and Nepali

Alice Kehoe

Ms. Kehoe brings extensive experience in digital financial services, with a focus on research, framework creation, due diligence, and implementation of inclusion-focused projects. For instance, she recently worked with the CDC Group, a UK-based finance institution, on the development an impact investment thesis which included various financial services models (e.g., fintech, microfinance, affordable housing finance). This is bolstered by her work in designing and implementing projects to promote financial literacy and enhancing customer-centric practices. Prior to this, Ms. Kehoe focused on measuring social impact, which means that her development work is complemented by a focus on return on investment and ensuring evidence generation.

Professional History

CDC GROUP is the U.K.'s development finance institution with over \$5bn in private equity assets across Africa and South Asia.

Development Impact – Financial Services Investments; Executive & Associate San Francisco, 2017 - 2019
Investment teams include development impact and financial executives reflecting CDC's dual mission of impact and return.

Conducted due diligence to develop impact investment thesis for 10+ deals (~\$1bn) as team lead on impact in financial services:

- *Developed impact investment thesis:* interviewed senior management, Board members, staff, employees and customers to understand business models and expansion strategies. Assessed management's ability to deliver impact investment thesis.
- *Tested impact case:* Tested growth assumptions of the financial model, modeled impact targets, engaged with economists and industry experts and analyzed national development statistics.
- *Approvals across a variety of financial services models:* commercial banking, fintech, microfinance, affordable housing finance and solar home system financing (pay-as-you-go).
- *Onsite field visits* in Benin, Botswana, Cote d'Ivoire, India, Nigeria, Rwanda and the U.A.E. (for a potential deal in Afghanistan).

Led design and implementation of inclusion-focused projects in collaboration with financial services portfolio companies:

- *Review of financial literacy program:* collaborated with bank investee company (\$8bn loan portfolio) to review financial literacy program content for the low-income segment in rural Bihar, before expanding the program to Assam. Conducted site visit and analyzed data on retention, conversion and attendance datasets, to provide recommendations to improve engagement.
- *Managed consultants to enhance customer-centric practices at portfolio companies:* managed customer protection assessments at microfinance and affordable housing institutions in India to support sustainable expansion strategies. Included surveys of 400+ customers, translation of consultant findings into key recommendations for Board use, and design of M&E template.

Developed strategic frameworks to inform investment prioritization and tools for due diligence:

- *Developed frameworks across financial services models:* led development of impact framework for pay-as-you-go solar home system financing, included articulation of typical customers and their needs, impact goals, M&E and value addition approaches. Contributed similar content to financial services, fintech and insurance strategy mappings, included collaboration with CENFRI, NYU's FAI, BFA and PwC. Fintech piece included evidence review linking digital financial services to SDGs.
- *Created customer protection due diligence tool:* to be used across B2C companies targeting low income segments. Produced separate tool for digital financial services, including best practices for data protection and interoperability.



CDC representative at external panels and events: panelist on customer protection in digital financial services at CGAP event, CDC lead for GOGLA impact working group, CDC representative at SME Finance Forum and Social Protection Task Force events.

Development Impact – Monitoring & Evaluation; Associate

London, 2014 - 2017

Produced and supported economic thought leadership pieces with portfolio companies to drive organizational learning:

- Coordinator and co-author of a regression impact study analyzing financial performance and employment growth at 200 SMEs following receipt of a loan from an investee bank ([link](#)). Presented findings to IFC economists in Washington D.C.
- Co-authored methodology to model indirect jobs created using social accounting matrices and labor force data ([link](#)).
- Managed data queries for a Harvard Business School evaluation of impact in CDC's intermediated equity portfolio ([link](#)).

Managed and trained a team of three to deliver impact reporting results for published annual review and to shareholder:

- Responsible for delivery of social impact data results for c.1000 portfolio companies (including underlying fund investees).
- Training included Excel database management, quality checks, statistical analysis and modeling gaps using central bank sources. Two of three interns/associates trained were retained at CDC and subsequently promoted.

Corporate Communications; Master's Internship

London, July - Sept & Dec 2013

Contributed to communications strategy:

- Interviewed legacy fund investment managers on achievements and challenges faced, for use in promotional materials.
- Summarized investment proposals for deal announcement press releases, and supported website launch.

APAX PARTNERS

London, Jan - Feb 2013

Retail and Tech; Investment Intern

Researched and presented materials on pipeline and sectors: Pipeline research consisted of business overviews, market shares, board biographies, attractions/drawbacks of investment, and summary financials. Led entertainment sector research.

Compiled competitor analysis: maintained tracker of buyout and investments by competitors.

Education

MSc LONDON BUSINESS SCHOOL, Management 2013 – 2014

Included finance, economics, accounting. Highest mark in class on regression coursework. Active member of 'Net Impact' club.

B.A. KING'S COLLEGE LONDON, History 2008 - 2012

Coordinator at SIFE (Students in Free Enterprise), led local restaurant project as part of King's College Consultancy club.

Leah Gatt

Ms. Gatt brings years of experience in research, analysis, and on-the-ground implementation, in both digital financial services and health. For digital financial services solutions, she has managed country teams, vetted local project partners, worked directly with aggregators and mobile network operators on processes and pricing, created useful tools for stakeholders, and documented practices. She has also worked with local organizations in tailoring mobile money toolkits and training processes to their organization. In terms of health, Ms. Gatt led the research and development of the roadmap, strategic plan, and costing for the Digital REACH Initiative – a regional initiative in the East African Community focused on the use of digital to improve health outcomes.

Professional History

Vital Wave, Inc. New York, NY July 2013 - Present
Director of Research (promoted from Consultant)

- Lead and support research, analysis, and on-the-ground implementations across Vital Wave's digital financial service projects
- Support the development of policies and 'best practices' across Vital Wave projects
- Manage project partnerships with project stakeholders, including telecoms, the private sector, NGOs and donors
- Support partners in developing appropriate technical, operational and financial internal policies in response to organizational change

Consultancy Africa Intelligence (CAI)

May 2013 – December 2013

Production Coordinator and External Consultant

- Coordinated the monthly production of the Africa Conflict Monthly Monitor report.
- Researched and wrote on African political economy and industry for CAI website and report.

European Commission, Africa Relations Unit in DG Agriculture, Belgium

October 2012 - April 2013

Interim Policy Officer (promoted from Trainee)

- Organized a high-level EU-Africa agribusiness conference for 150 public and private sector participants.
- Researched, co-wrote and edited an EU publication on risks and opportunities of investment in African agribusiness.
- Provided data analysis and briefings for EU trade negotiators in preparation for international negotiations
- Prepared briefing packs and speeches for senior management and the Commissioner of Agriculture.

Lagos State Government, Lagos, Nigeria

March - April 2012

Researcher and Consultant

- Conducted interviews and focus groups with high-level government officials and range of informal sector taxpayers.
- Presented policy brief and paper to Lagos State Governor and Internal Revenue Service to advise on increasing support for tax.

Kare4Kenya, Nairobi, Kenya

March 2009- September 2010

Project Manager

- In charge of drafting Overseas Development Aid proposal that secured funds for organization.
- Oversaw implementation of a government funded community project in slum of Nairobi.

Education

UNIVERSITY OF OXFORD

2011 - 2012

M.Sc. in African Studies

- Dissertation: The Impact of Direct Taxation on State-Society Relations in Lagos, Nigeria.

LONDON SCHOOL OF ECONOMICS (LSE)

2010 - 2011

M.Sc. in International Relations

- Dissertation: Negotiating Liberalization: Southern African Countries in Trade Negotiations with the EU.

- Awarded European Social Fund STEPS Scholarship.

UNIVERSITY OF MALTA

2006 - 2009

B.A. in European Studies (graduated top 5% of class)

Related Publications

- Dissertation: The Impact of the EU's Trade Policy in West Africa (Awarded Best Dissertation.)
- 'Encouraging tax compliance in the informal sector', Briefing paper, Oxford Centre for the Study of African Economies, 2013
- 'Venturing North: South Africa's pioneering role in African investment', Polity, 2013
- 'Room to move: Examining barriers to the mobility of goods and intra-African trade', Polity, 2012.

Languages

English (fluent), Maltese (fluent), French (working knowledge), Arabic (basic knowledge).

Derek Treatman

Mr. Treatman is an engineer and digital-for-development specialist with extensive experience adapting digital technologies to meet the needs of diverse stakeholders. His work in complex, resource-poor settings has focused on applying readily available technologies to strengthen national systems. Mr. Treatman has over 16 years' experience implementing technology in diverse environments and 10 years' experience leading teams and managing staff for community-based programs in low-resource settings and national-level deployments with national governments across Sub-Saharan Africa, South-East Asia, and Latin America. At Vital Wave he supports governments and NGOs as they implement and optimize major initiatives. He also regularly contributes to the creation of common goods and manages cross-sector partnerships as well as communities of practice.

Professional History

VITAL WAVE – Director, Technology Solutions, International, 2016 – current

- Managing client relationships in multi-year international health development initiatives with philanthropic foundations, governments, and technical partners.
- Leading implementation of electronic platforms for centralized management and distribution of key health system information to facilitate data-driven decision making and resource allocation planning.
- Managing teams of in-country and expatriate staff, and vendor contracts.

VITAL WAVE – Technical Advisor, New York, NY, 2013 – 2016

- Senior ICT implementation specialist to optimize a maternal and neonatal health call-center in Nigeria for a Bill & Melinda Gates Foundation (BMGF) grantee.
- Technical advisor for an HIV data and systems landscape and assessments in Tanzania and Zambia.

MOUNT SINAI HEALTH SYSTEM – Project Manager, New York, NY, 2013 – 2015

- Led the implementation of an enterprise-wide, web-based platform for creating, reviewing, and approving new research proposals to the National Institutes of Health (NIH) including development of functional requirements documentation, visual mockups, communication strategies, scope documents, vendor assessments, stakeholder maps, project plans, and multi-tiered user support processes.
- Assessed potential solutions and devices for patient engagement, clinical care, clinical research, and data management as member of the Enterprise Architecture Advisory Group, the eHealth Advisory Group, and the eHealth Working Group.
- Developed institutional process for generating standardized program metrics from customer relationship management (CRM) and bug tracking tools.

COLUMBIA UNIVERSITY – eHealth Engineer, Addis Ababa, Ethiopia, 2012

- Developed a mobile health system for the Federal Ministry of Health (FMOH) in an effort to strengthen the national Health Extension Program and reduce maternal and child mortality through monitoring of key health indicators via mobile app-based and web-based data collection tools.
- Assessed mobile handsets, mobile hotspot devices, and solar power solutions available in-country and mobile network availability at rural health centers in Amhara state.
- Developed a comprehensive training package for Health Extension Workers and call center agents.

DIMAGI SOFTWARE INNOVATIONS – Field Director, India, 2010 – 2012

- Implemented mobile health pilots using Dimagi's J2ME CommCare platform in partnership with a variety of International Aid Organizations and Indian NGOs including Save the Children, IntraHealth International, Pathfinder, WorldVision, Catholic Relief Services, and NEEDS.
- Created a rapid localization process to translate health education content into local dialects.
- Led training sessions and interviews with Community Health Workers (CHWs).



MOUNT SINAI HEALTH SYSTEM – Informatics Core Manager, New York, NY, 2007 – 2009

- Designed and developed HIPAA compliant, web-based, research databases and reports for clinical trials.
- Provided technical guidance to clinicians and researchers on data management, treatment randomization, and statistical analysis of research data for Data Safety Monitoring Boards (DSMBs).
- Technical lead for an international lung cancer research initiative with centers in New York and Taiwan.
- Assisted the Research Dean's office in editing Mount Sinai's first awarded proposal to the National Institutes of Health (NIH) for the Clinical and Translational Science Award (CTSA).

MOUNT SINAI HEALTH SYSTEM – Research Coordinator, New York, NY, 2007

- Procured and preserved hundreds of surgical tissue samples for Manhattan Brain Bank Biorepository to be distributed to researchers and cancer research centers.
- Observed over two dozen surgeries and hundreds of gross examinations.

SILICOM – Validation Engineer, Paris, France, 2006

- Consulted for one of France's largest cell phone provider, SFR, to test new cell phone and server equipment for 2G, 3G, and 3G+ networks across France.
- Worked with mobile equipment providers including Sony Ericsson, Motorola, and Nokia to test and troubleshoot mobile services including SMS, MMS, WAP, and VoD.

GEORGIA TECH LORRAINE – Assistant to IT Director, Metz, France, 2005 – 2006

- Developed web-based PHP applications to manage job placement and opportunities databases.

RUTGERS UNIVERSITY – Assistant to IT Director, Piscataway, NJ, 2002 – 2005

- Designed and developed web-based Perl applications to manage university financial databases.

BETH ISRAEL DEACONESS MEDICAL CENTER – Research Coordinator, Boston, MA 2002

- Procured and preserved surgical tissue samples for the Harvard Medical School Tissue Bank.

Education
GEORGIA INSTITUTE OF TECHNOLOGY, METZ, FRANCE, 2006

Master of Science in Electrical and Computer Engineering (GPA: 3.87/4.0, Highest Honors)

ÉCOLE SUPÉRIEURE D'ÉLECTRICITÉ (SUPÉLEC), METZ, FRANCE, 2006

Mastère Professional in Electrical and Computer Engineering

RUTGERS UNIVERSITY, PISCATAWAY, NJ, 2005

Bachelor of Science in Electrical and Computer Engineering (GPA: 3.89/4.0, Highest Honors)

Languages

English (native), French (fluent), Hindi (conversational)

Brendan Smith

Brendan Smith brings over a decade of expertise in the digital-for-development field, with a focus on organizational and multi-country assessments, strategy creation, and advocacy. This is complemented by his experience in field research and large-scale program implementation. He has led many of the company's highest profile engagements, personally contributing to the firm's leadership in the digital health field. His deep assessment work is complemented by his field experience in national digital-health and financial services implementations.

Professional History

Senior Vice President of Professional Services, Vital Wave | 2008 - Present

- Manage Vital Wave engagements for major technology, health, and financial services companies and global foundations across low-resource environments in Asia, Latin America and Africa
- Lead analysis and development of major industry and foundation reports on digital health and health information systems in the developing world
- Coordinate multi-stakeholder partnerships and consortia to design and develop large-scale digital health implementations
- Direct extensive field research in locations such as India, Brazil, Ethiopia, Turkey and South Africa,
- Lead company recruiting efforts and manage a variety of outsourced research teams in multiple geographic regions
- Develop training and project management manuals and guidelines to improve project execution and performance

Lead Analyst, Proactive Worldwide, Inc. | 2004 - 2007

- Manage client relationships for several Fortune 500 accounts
- Write proposals and determine budgets for research engagements for leading payments providers
- Manage multiple simultaneous research engagements on the payments industry and the analysts assigned to these projects, delivering a 100% on time record with a majority of projects completed under budget
- Present report findings to senior-level financial services executives, resulting in a repeat-engagement rate of over 80%
- Create company-wide and new employee trainings
- Winner of the 2006 Proactive Leadership Award, the company's highest honor

Education

MSc International Political Economy, London School of Economics, 2003

B.S. Foreign Service, Cum Laude, Georgetown University, 1998

Certificat d'Etudes Politiques, L'Institut d'Etudes Politiques- Université Lyon II, 1997

Languages

English: Native speaker.

French: Fluent in speaking, reading and writing.

Brooke Partridge

Brooke Partridge is a business executive, entrepreneur, and thought leader in the use of digital solutions to address large-scale system issues across low- and middle-income (LMIC) countries. She has led the development of Vital Wave's Digital Health Practice and personally shepherded field-building activities in digital health such as the creation and adoption of the Principles for Donor Alignment in Digital Health. Through these engagements she has created robust investment and programmatic strategies as well as facilitated cross-sector convenings, all of which have been reinforced by her implementation experience.

Professional History

Vital Wave, Inc.

Palo Alto, California

President and CEO

July 2005 to Present

Founded a professional services firm for delivering information and communications technology solutions at scale in developing countries.

Business Results

- ❖ Established the company as the leading professional services firm in information and communications technology for development (ICT4D). Built recognized practice areas in health, education, financial services, agriculture, gender and development, and other key, global industries
- ❖ Built a repeat client base that includes Fortune 500 firms and global foundations including Intel, Microsoft, Cisco, Qualcomm, Johnson & Johnson, Pfizer, Vodafone, the GSM Association, the Gates Foundation, World Bank, the UN Foundation, and the World Economic Forum
- ❖ Cultivated the company's holistic, systems-based approach to solving large-scale systems issues
- ❖ Established the company as thought leader in ICT4D through the development of original content and landmark global publications
- ❖ Regularly conduct end-to-end engagements with global clients to conduct strategic assessment, planning, design, and implementation of technology solutions
- ❖ Directly influenced clients' strategic plans and execution for increased social and economic impact in developing countries, providing consultation to business leaders, executives, and boards of directors
- ❖ Built a talented yet versatile firm that combines technical capabilities, deep expertise on low-resource environments, and ICT4D industry leadership

Responsibilities

- ❖ Provide strategic insight, direction, and industry expertise to clients and associated engagements
- ❖ Drive company thought leadership through strategic direction, analysis, synthesis, and content contribution
- ❖ Build a global network of company resources and partnerships for in-country expertise
- ❖ Represent the company as a thought leader in ICT4D to press, customers, and partners
- ❖ Drive creation and implementation of company strategy

HEWLETT-PACKARD CO., Emerging Market Solutions (EMS)
California

Palo Alto,

Director, Market and Business Development

October 2002 to July

2005

Developed and commercialized technology solutions designed for emerging markets. Created a network of internal and external partnerships to maximize cross-sector business growth for HP in developing countries.

Business Results

- ◇ Developed and launched new HP product category within 10 months of staffing the team
- ◇ Achieved highly competitive pricing while surpassing HP's normal profit margin



- ◇ Multi-user PC solution provided high levels of customer satisfaction in public sector and SMB
- ◇ Generated global PR for HP as a leader in emerging market and developing country business
- ◇ Provided HP with breakthrough methods for penetrating emerging markets, especially public sector

Responsibilities

- ◇ Drove the creation and implementation of the initial EMS business strategy
- ◇ Built the EMS business team with all functions for solution creation: R&D, product marketing, support, supply chain, procurement, alliance management, business development, market research and communications
- ◇ Led the team to design, develop and commercialize HP's first technology solution for emerging markets – *The HP Multi-user 441 Desktop PC Solution*
- ◇ Developed an ecosystem of public and private-sector partnerships in support of business activities
- ◇ Analyze and direct fiscal activity to ensure positive profit margins
- ◇ Drive research and work with analysts to monitor competitive landscape and market conditions
- ◇ Represent EMS business activities to the press, strategic customers and across the company
- ◇ Lead geographic expansion of the multi-user PC and create a portfolio of emerging market solutions

HEWLETT-PACKARD CO., Worldwide Sales, Emerging Business Organization

Rochester, New York

Market Development Manager

August 2000 to October

2002

Incubated new technology businesses for HP through development and execution of go-to-market strategies

HEWLETT-PACKARD CO., HP Pavilion PC Product Line

Cupertino, California

Support Solutions Manager

July 1997 to August

2000

HEWLETT-PACKARD CO., HP Pavilion PC Product Line

Cupertino, California

Worldwide Forecasting Manager, HP Pavilion PCs

January 1996 to July

1997

Developed and implemented processes for forecasting retail sales in nine countries.

STANFORD UNIVERSITY, Department of Spanish and Portuguese

Stanford, California

Lecturer, Spanish language and cultures

September 1993 to December 1995

Developed and taught beginning, intermediate and advanced courses.

ADAPTEC, INC.

Milpitas,

California

Marketing Account Manager

April 1992 to May

1993

Developed and implemented outbound marketing strategies for key OEM accounts.

Education
STANFORD SCHOOL OF BUSINESS, Stanford University

November 2004

Finance for Executives, Week-long Intensive Course

UNIVERSITY OF CALIFORNIA, San Diego

Masters of Pacific International Affairs, Latin America Specialization

Completed June 1991

UNIVERSITY OF WISCONSIN, Madison

Bachelor of Science Degree, Economics and International Relations

Completed May 1989



Certification:

I, the undersigned, certify that to the best of my knowledge and belief, these CVs correctly describe the firm, the qualifications, and their experience, and that those identified are able to undertake the assignment in case of an award.

Name:	Signature:	Date:
Brooke Partridge	DocuSigned by: <i>Brooke Partridge</i> EABA2F94AAFE4E9...	December 20, 2019