

Request for Proposal: Development of Web-Based Toolkit for Cross-Jurisdictional Sharing in Public Health

Deadline for Submission: April 3, 2017

Purpose

The [Center for Sharing Public Health Services](http://www.phsharing.org) (the “Center”, www.phsharing.org) is issuing this Request for Proposal (RFP) seeking one or more strategic partners to develop a web-based “toolkit” to guide and facilitate public health practitioners and policymakers through the exploration, planning and implementation of cross-jurisdictional sharing arrangements among public health jurisdictions.

Overview

The Center is a national initiative managed by the Kansas Health Institute with support from the Robert Wood Johnson Foundation. Since 2012, the Center has served as a national resource on *cross-jurisdictional sharing* (CJS), building the evidence and producing and disseminating tools, methods and models to assist public health agencies and policymakers as they consider and adopt CJS approaches.

Cross-jurisdictional sharing is the deliberate exercise of public authority to enable collaboration across jurisdictional boundaries to deliver essential public health services and solve problems that cannot be easily solved by single organizations or jurisdictions.

The Center has created [A Roadmap to Develop Cross-Jurisdictional Sharing Initiatives](#) (the “Roadmap”), to help guide jurisdictions through the process of considering or establishing CJS arrangements. There are three distinct *phases* on the Roadmap:

- **Phase One:** Explore
- **Phase Two:** Prepare and Plan
- **Phase Three:** Implement and Improve

Each phase contains a set of *areas* to explore. Resources and tools have been identified or developed for each area. Areas in the Roadmap are further broken down into issues to consider, phrased as *questions*. While the progression of phases should take place in the order presented, the areas and issues within each phase do not necessarily have to follow the same order as listed on the Roadmap. The Roadmap is intended to be more of a guide than a set of specific step-by-step directions for those working on or considering CJS for their jurisdictions.

Over the past four years, Center staff have developed tools and assembled resources to assist partners and public health officials in the implementation of the Roadmap. Whenever possible, tools have been linked to specific areas and questions in the Roadmap. However, these tools and resources are currently not organized in logical modules, and are almost exclusively text-based. **Therefore, it is the desire of the Center to solicit proposals for the development and ongoing maintenance of a web-based, interactive toolkit to educate users about the learning, process and implementation of CJS arrangements.**

Audience

The primary target audiences for the toolkit will be public health practitioners and administrators engaged in considering, developing and/or implementing CJS activities. Secondary target audiences include policymakers involved in the approval and monitoring of CJS agreements, as well as partner organizations representing public health officials and policymakers. Center staff will also use the toolkit for in-person trainings and webinars.

Definitions

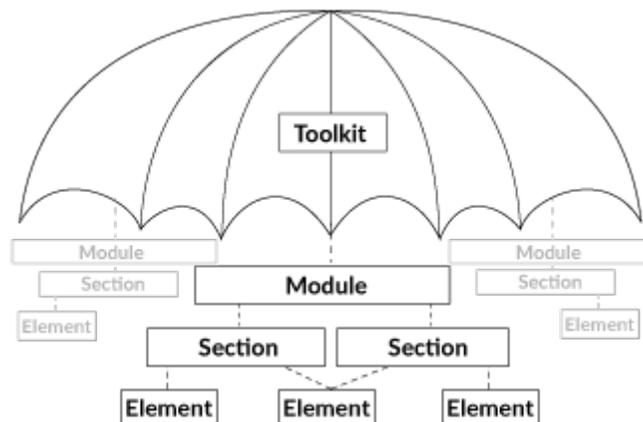
For the purpose of this Request for Proposal, we will use the following definitions to describe the hierarchy of the toolkit.

Toolkit: the web-based system that combines all the resources developed for this project (elements, sections and modules).

Element: a single product, focused on one topic, that conveys a piece of knowledge or information. For example, a short video describing the importance of trust among partners; or a PDF document with a case study about how to build trust. Multiple elements are combined into a section. Some elements may be used in more than one section.

Section: a set of elements addressing the same topic. A section may include one or multiple web pages. For example, a section on “institutional trust” may be covered throughout three pages, each including a few elements about institutional trust, while a section on how to define the goals of a CJS initiative could include only a few elements within one or two pages.

Module: a set of sections addressing separate, but related topics. For example, how to initiate a CJS agreement (with each step representing a section); or how to assure the presence of success factors in a CJS project (with each success factor representing a section).



Center’s Vision and Uses of the Toolkit

The Center’s vision is to have the toolkit packaged so that it can be utilized in multiple ways and by multiple types of users. Some users may use a video, or learn from one specific module that applies to their work at-hand, while others may choose to go through the entire toolkit, section by section. The toolkit must be flexible for these scenarios and not constrain users to a single method for learning.

Examples of ways in which users of the toolkit will be able to receive assistance include:

- Define and understand a range of CJS approaches;
- Research and locate relevant resources and tools to assist them in their efforts;
- Identify success factors important for the success of their CJS efforts;
- Explore CJS arrangements and determine whether and how CJS might benefit public health practice in their area;
- Plan CJS arrangements;
- Implement CJS arrangements;
- Develop strategies to overcome barriers they encounter; and
- Evaluate and improve CJS arrangements as needed.

In addition, Center staff shall be able to:

- Utilize the toolkit to instruct and provide technical assistance to users on planning and establishing CJS agreements, in person or virtually.

Content Development

The Center has collected a vast amount of information that can be used to develop the specific content for the toolkit. A limited amount of the content has also been developed and will be provided to the selected vendor at the start of the project. This content (based primarily on text-based documents) is not complete, is fragmented and is not always consistent with the Center's vision for the toolkit. Additional content will be developed by the vendor during the course of this project, as directed by the Center. The Roadmap will serve as the conceptual framework to organize the toolkit. *Vendors do not need to have specific knowledge about CJS.* During project kick-off, the Center will meet with the selected vendor to describe the inventory of current content, and planned development of new content.

Elements

The Center estimates development of approximately 100-150 elements for the toolkit. Elements will cover single aspects of CJS.

Sections

Elements related to the same topic will be organized in *sections* (approximately 15-20). Sections may differ in length, spanning from one to several web pages each, with cross-linked content (as applicable) for user ease.

Modules

From the individual elements and sections, we also want to create broader training *modules* (approximately 5-7) that can connect related sections for continuity of learning (for example, to cover an entire phase of the Roadmap).

The table below provides an example of a module, sections and elements. (Please note: this is a truncated example. We anticipate that each module is likely to have more than two sections, and each section may have more than two elements.)

Module:	Roadmap Phase 2: Prepare and Plan			
Sections:	Context and History		Governance	
Elements:	SWOT tool	Inventory of CJS arrangements	Video on shared governance models	Sample governance agreement

Project Assumptions and Deliverables

The vendor will determine, in conjunction with Center staff, the information and materials to include in the toolkit so that it can offer flexibility for the user (i.e., read one module, watch one video, follow the Roadmap, etc.). The goal is to make a comprehensive set of resources with multiple entry points.

The vendor will also identify and develop for each section the relevant elements containing text, definitions, figures, tables, examples, tools, references, links, videos, exercises, case studies and other pertinent information to create the structured toolkit product, and will organize sections into modules.

The following list describes roles and responsibilities for the Center and the vendor. This list may be altered or expanded as needed during the development of the scope of work.

Center for Sharing Public Health Services will...	Vendor(s) will...
Provide an overview of the knowledge and information to be included in the toolkit.	Acquire basic understanding of the critical issues involved in CJS.
Draft a framework of modules and sections based on the Roadmap, Success Factors, Spectrum and other relevant Center products.	Recommend modifications to and finalize the framework.
Direct vendors to existing elements.	Discuss with Center additional elements to be included in the toolkit.
Provide feedback on the vendor’s products and otherwise work with vendor to finalize the toolkit.	As needed, translate elements into various media formats.
	Develop new elements as needed.
	Organize modules, sections and elements.
	Ensure that the toolkit’s website functionality maximizes the user learning experience.
Test elements, sections and modules.	Test elements, sections and modules.

Proposal Option 1 (preferred option): Development of BOTH content (elements/sections/modules) AND web-based platform for the toolkit.

Under this option, the vendor will be responsible for the development of both the content (elements/sections/modules) and the web-based platform for the toolkit that will host the content as described in Option 2 and Option 3, below. The use of subcontractors is allowed.

Proposal Option 2: Development of content (elements/sections/modules) only.

The vendor will be responsible for developing the entire inventory of content using leading instructional design techniques for multiple learning styles. The vendor will assure that the content:

- Is based on a modular design organized in elements, sections and modules (as described above) to be hosted on a web platform;
- Adopts an instructional design appropriate for an adult audience of practitioners; and

- Contains an appropriate mix of media (text, animation, video clips, audio clips, etc.) to maximize the learning potential.

Vendors proposing this option will be expected to work closely with the selected web design vendor to assure that all content is organized and structured to maximize the users' experience and learning potential.

Proposal Option 3: Development of web-based platform for toolkit only

The vendor will be responsible for the development of the web-based platform to host the toolkit. The platform will provide a “portal” to a variety of elements/sections/modules and will have flexible navigation to help users easily find content of interest. The vendor will ensure that the web-based platform embodies the following characteristics.

- The toolkit, while separate, will have the same look and feel as the Center’s website (www.phsharing.org) and will be linked from the Center, providing a user-friendly transition for the site visitors.
- Navigation through the toolkit is intuitive and user-friendly, and includes consideration of user literacy.
- The site will have a robust search engine.
- The Center will be able to track usage of the system through Google Analytics or another equivalent metrics tool recommended by vendor.
- The Center staff will be able to manage content in the toolkit using a web-based content management tool. (Currently, the Center uses WordPress to manage the content of its site.)
- The site will be able to present video and audio online.
- The site will comply with federal regulations on web accessibility (Section 508).
- The site will be equipped with web security features to prevent system vulnerabilities (protection from malicious code or other threats to web-based application or content).

Contract Opportunity

The Center seeks to identify one or more vendors that can develop the toolkit based on the Roadmap model, using knowledge, information and resources developed and identified by the Center. This RFP serves as a guide for the plan and vision of the Center’s toolkit, but the Center acknowledges that vendors may provide new ideas or suggestions that the Center may consider. A formal contract will be implemented once a vendor is selected and will include a final, agreed-upon scope of work.

The use of subcontractors for portions of this project is allowed. Subcontractors must be approved by the Center prior to engagement.

This RFP describes a time-limited contractual opportunity for the development of the toolkit. The Center is also interested in securing ongoing support and maintenance of the web resources developed through this contract and therefore will welcome proposals that include this feature. Instructions to this end are included in the “Proposal Requirements” section below. **Please note: The provision of ongoing web support and maintenance is not a requirement for a successful proposal.**

Funding and Timeline

Funding for this contract is provided to the Center by the Robert Wood Johnson Foundation. The selected vendor will be required to work closely with the Center and be responsive to guidance to achieve the approved project goals.

The project will begin on May 8, 2017. Development, testing and rollout for the toolkit is anticipated to last through November 8, 2017. Below is a summary timeline, subject to change during contract negotiation. Vendors are encouraged to indicate in their proposals sign-off points and related dates for important project milestones.

- RFP release: February 21, 2017
- Required Letter of Intent: March 15, 2017
- Deadline for questions submission: March 16, 2017
- Proposal submission: April 3, 2017
- Notification to winner(s): April 21, 2017
- Kick-off meeting (in-person if possible, otherwise virtually): May 8, 2017
- Develop and testing of elements, sections and modules: start on May 9, 2017; continue through November 8, 2017, based on the timeline provided by the vendor
- Comprehensive final testing of entire toolkit: from November 9-17, 2017
- Final signoff on toolkit: November 30, 2017
- Launch date: December 15, 2017

Eligibility and Qualifications

Eligible vendors shall demonstrate experience developing online instructional applications, or may apply in partnership with other organizations with such experience. Preference will be given to vendors with experience in developing web-based training and technical assistance tools for an adult audience. The skills and functions needed for completing this project include the ability to develop teaching tools for adult audiences, graphic design, Web development, Web video and audio production, and writing effective narrative. The Center staff are the subject matter experts for these topics and will provide oversight for all deliverables.

Proposal Requirements

All vendors must submit a **Letter of Intent via email to phsharing@khi.org no later than 5:00 PM CST, March 15, 2017**. The Letter of intent needs to contain the legal name of organization; Tax Identification Number; contact person for this application (email address and phone); and a statement that the organization is planning to submit a proposal for this contract.

All vendors must submit their formal proposal **via email to phsharing@khi.org no later than 5:00 PM CST, April 3, 2017**. Applications received after this deadline will not be considered.

Proposals must include answers to each of the questions/requirements (as worded in this section), following the same order below.

A) Questions for all applicants:

1. **Organizational Overview:** Please share a brief description of your organization's general capacity and expertise that would support this project. Please include mailing and website address for your company.

2. Specify if proposal includes Proposal Option 1 (development of both specific elements, sections and modules and the web-based platform to host the toolkit), Proposal Option 2 (development only of the content) or Proposal Option 3 (development only of the web-based platform).
3. Please describe interest and experience that demonstrate ability to complete the scope of work as outlined.
4. Provide at least two project references for completed work similar to the requirements of this RFP.
5. If applicable, please attach up to three examples of instructional products or websites developed by the vendor or its partners, and include hyperlinks to the examples.
6. Provide a work plan and timeline of major milestones for the project, including sign-off steps.
7. Provide a budget and budget narrative clearly indicating itemized costs for the Proposal Option selected. For personnel, please indicate the names and titles of the staff assigned to the project and their respective levels of efforts in support to each of the parts and phases of the project. If proposing subcontracts, please indicate the same budget information for each subcontractor.
8. If proposing the use of subcontractors, include their name, contact details, qualifications and references.

B) Questions for Proposal Options 1 and 2:

1. Please include experience related to:
 - a. Developing online instructional applications for web-based training for adult audiences.
 - b. Incorporating instructional design resources, effective adult learning techniques, and effective methods of training.
 - c. Producing diverse, effective learning tools.
 - d. Web video and audio production.
 - e. Writing effective narrative to communicate knowledge to a diverse adult audience.
2. If awarded a contract to complete this work, what would the vendor's approach be? Please address the following:
 - a. Describe how the vendor would engage the Center in the process of development and implementation of this toolkit.
 - b. Describe approach to designing the toolkit.
 - c. What types of instructional design resources and effective learning modalities or techniques would be recommended or explored for the toolkit, keeping in mind the target audience for the toolkit?

C) Questions for Proposal Options 1 and 3:

1. Please include experience related to:
 - a. Web development; and
 - b. Graphic design.

2. Describe how the toolkit and the Center's websites will be linked.
3. Describe the proposed navigation system and how navigation through the website will be made user-friendly.
4. Describe the search engine that would be included and how it would be implemented.
5. Describe the tracking system proposed to track usage.
6. Describe the content management tool proposed.
7. Describe how video and audio elements will be incorporated in the website.
8. Describe how the website will be compliant with federal regulations on web accessibility (Section 508).
9. Describe the proposed web security features.
10. Provide a suggestion for hosting the newly developed website, specifying if hosting would be provided by the vendor or by the Center.
11. If applicable, in a separate addendum, provide a proposal for ongoing maintenance of the toolkit, including a cost schedule and experience and references in web management.

Notice to Vendors

The Center reserves the right to modify the terms of this RFP with reasonable notification to all interested parties. This RFP and any related discussions or evaluations by anyone create no rights or obligations whatsoever. The Center may cancel, modify or delay this solicitation at any time at its own discretion.

Adherence to Specifications

It is not the intent of the terms of this RFP to rule out or eliminate any prospective vendor's ideas or approaches. If the services vendors propose do not comply with some of the specifications as written, vendors should include with their proposal an explanation for deviation or variation from the specifications. The Center may, at its sole discretion, consider or deny any deviation and contract for the services that best suit its intended objectives. If a vendor does not have direct experience with one or more of the specified criteria, the vendor can submit examples illustrating how the criteria might be accomplished.

The Center will evaluate each proposal submitted in response to this RFP to determine the most responsive and appropriate proposal(s). The Center seeks proposals offering the best value, while maintaining a high standard, and that best meets the goals of the project, as described above. The Center retains the sole discretion to choose one proposal, more than one proposal, or to reject all proposals as unacceptable. Finalists will be asked to submit a sample engagement contract for their services.

Questions

For questions regarding the RFP process, please email PHSharing@khi.org. You may expect responses within three business days. Formal questions regarding the requirements of the RFP must be received via email at PHSharing@khi.org by 5:00 p.m. CST on March 16, 2017, according to the Proposal Requirements section of this RFP.