



# Request for Proposals (RFP): Instructional Design for Scientific Writing Comprehensive Curriculum

**October 28, 2019**

**Submissions due to Elizabeth Toure** ([infectious.diseases@aphl.org](mailto:infectious.diseases@aphl.org))

via: The Association of Public Health Laboratories, Inc.  
8515 Georgia Avenue, Suite 700  
Silver Spring, MD 20910

## Table of Contents

---

Summary.....	3
Background.....	4
Eligibility.....	4
Anticipated RFP Schedule .....	4
Response Submittal .....	5
Confirmation of Intent to Respond.....	5
Final Response .....	5
Questions .....	5
Scope and Approach.....	6
Project Term and Award.....	7
Proposal Submission.....	7
Guidelines and Required Information .....	7
Cost Proposal.....	8
Evaluation.....	8
Initial Review.....	8
Evaluation Process .....	9
Evaluation Team .....	9
Conflicts of Interest.....	9
Evaluation Criteria.....	9
Post Evaluation Procedures .....	10
Conditions of Award Acceptance.....	10
General Considerations .....	11
Appendix A – Scientific Writing Comprehensive Curriculum Learning Objectives .....	12
Appendix B – Program Framework and Project Approach .....	17
Background and rationale.....	17
Target Audience .....	17
Available Course Materials .....	18
Timetable .....	18
Project Overall Timeline (estimated) .....	18
Project Approach .....	18
Instructional Methods.....	19
Appendix C – Instructional Designer RFP Scorecard.....	21
Appendix D – Conflict of Interest Disclosure Statement and Policy (For Completion by Reviewers Only – Applicants Do Not Need to Complete) .....	23

## Summary

---

The Association of Public Health Laboratories, Inc. (“APHL”, or “the Association”), in collaboration with the United States Centers for Disease Control and Prevention’s (CDC) National Center for Immunization and Respiratory Diseases (NCIRD), is developing a comprehensive scientific writing curriculum. APHL will ultimately electronically host the curriculum that will serve as a collection of training materials and resources for a variety of domestic and international public health laboratory trainings. Under this project, the final deliverable will be self-directed, interactive eLearning modules hosted on APHL’s website as well as printable field learning packages including learner and instructor guides mirroring the eModule content.

APHL is seeking an instructional designer to help broadly guide and execute the development of the comprehensive curriculum, the accompanying design, and packaging of modules and field guides. The curriculum will be designed based on pre-identified learning objectives and prioritized competencies utilizing the [MMWR Competency Guidelines for Public Health Laboratory Professionals](#), which provide a guiding framework for producing education and training programs. Each eLearning module and associated material will be aligned with a Core Competency (see Competencies RES 7.00 and RES 8.00 in MMWR link).

APHL has a repository of independently developed scientific writing courses and accompanying materials, and the goal is to use these existing resources to package them into a cohesive, standardized source of information. Content, in the format of multiple Powerpoint slide presentations, already exists for all learning objectives, outlined in [Appendix A](#). These presentations will serve as the basis for curriculum development. As such, the awardee will be asked to rely on these existing materials and, with few exceptions, will not be generating de novo content but rather reorganizing and repackaging existing materials to create focused eLearning modules and accompanying field guides, which align with the Appendix A learning objectives. Proposals should include different, scalable options for the presentation of the content. This award will be for a maximum of \$230,000 and work must be completed by August 31, 2020. **APHL recognizes that the current time constraints and funding may not be sufficient to address all learning objectives in Appendix A and as such requests applicants to propose feasible phases based on prioritization outlined in Appendix A.**

Through this RFP, APHL seeks to identify a company or individual who can support a concept to completion project. Desired expertise and approaches include those found in the following traditional Analysis, Design, Development, Implementation and Evaluation ([ADDIE](#)) model:

- Program analysis and needs identification
- Program instructional design and development expertise
- Graphic/design layout capabilities and expertise
- Program monitoring and evaluation expertise
- Strong facilitation and project management methodologies

## Background

---

APHL is a non-profit organization that works to safeguard the public’s health by strengthening public health laboratories (PHLs) in the United States and globally. APHL is organized under the laws of the United States of America’s District of Columbia, with its headquarters office in Silver Spring, MD. The Association’s members include state and local laboratories, state environmental and agricultural laboratories and other government laboratories that conduct testing of public health significance. APHL is recognized as tax exempt in the United States under Section 501(c)(3) of the U.S. Internal Revenue Code. Its work on behalf of public health labs spans more than 60 years.

In collaboration with its members, APHL advances laboratory systems and practices and promotes policies that support healthy communities globally. The Association serves as a liaison between the public health laboratories and federal and international agencies. It ensures that the network of public health laboratories has current and consistent scientific information in order to be ready for outbreaks and other public health emergencies.

The APHL Infectious Diseases Program builds public health laboratory capacity to detect, identify and respond to infectious disease threats. APHL supports both domestic and global initiatives through Cooperative Agreement Number NU2GGH001993 (“Cooperative Agreement”) with the CDC. Under this Cooperative Agreement, APHL is working in coordination with the CDC to develop a comprehensive scientific writing curriculum for domestic and global implementation.

## Eligibility

---

Interested parties must submit a proposal to APHL that provides all of the information specified in the Proposal Submission section of this RFP. In order to be considered for funding, an applicant must ensure APHL has its complete proposal by no later than the Proposal Due Date specified in the Anticipated RFP Schedule section below. **Late submissions will not be accepted.** Applicants will find proposal submission information in the Response Submittal section below.

## Anticipated RFP Schedule

---

Applications are due to the individual(s) specified in the Final Response section of this **RFP by 5:00 pm Eastern Standard Time (EST) on November 22, 2019**. APHL anticipates the following schedule for the entire competitive bidding process:

October 28, 2019	RFP issued
November 5, 2019	Letter of Intent due to APHL by 5:00 pm EST
November 22, 2019	<i>Complete RFP responses due to APHL by 5:00 pm EST</i>
November 25 – December 5, 2019	Proposal review

December 5, 2019

APHL publicly announces the names of the selected applicants on its procurement website, [www.aphl.org/rfp](http://www.aphl.org/rfp)

January 6, 2020

Anticipated start date of project

If APHL makes any modification to this anticipated schedule, it will post the change to APHL's procurement website, [www.aphl.org/rfp](http://www.aphl.org/rfp).

## Response Submittal

---

### Confirmation of Intent to Respond

APHL requires that prospective applicants submit a brief email statement indicating intent to submit a proposal by **no later than 5:00 PM EST on November 5, 2019**. The letter of intent should be emailed to [infectious.diseases@aphl.org](mailto:infectious.diseases@aphl.org) (Attn: Elizabeth Toure). While the letter of intent is not binding and does not enter into the review of the RFP, the information that it contains allows APHL's evaluation team to plan the contract development and review process. A letter of intent is required for consideration of application. Potential applicants must include the name of the organization or individual that will submit the proposal in their email. **Upon receipt of a letter of intent, APHL will provide PDF files of the existing PowerPoint slides for Phase 1 learning objectives to help aid the applicant's proposal.**

### Final Response

APHL must receive a complete proposal by no later than **5:00 PM EST on November 22, 2019**. Applicants should submit proposals via email to [infectious.diseases@aphl.org](mailto:infectious.diseases@aphl.org) (Attn: Elizabeth Toure). It is the applicant's responsibility to ensure that the proposal is received at APHL by this deadline.

APHL will send an email acknowledging the receipt of your application. If you do not receive an acknowledgement within 48 hours, please call 240-485-3860 and email [infectious.diseases@aphl.org](mailto:infectious.diseases@aphl.org).

APHL may terminate or modify the RFP process at any time during the response period. All changes to the RFP will be posted to the APHL's procurement website, [www.aphl.org/rfp](http://www.aphl.org/rfp).

### Questions

Please direct all questions regarding this RFP or its application requirements via email to Stephanie Chester/Elizabeth Toure at [infectious.diseases@aphl.org](mailto:infectious.diseases@aphl.org).

A member of APHL's Infectious Diseases staff will respond directly to the questions on an individual basis as questions are received. While APHL will endeavour to answer questions within one business day of receipt, additional time may be needed depending on the issue raised. APHL anticipates that it will also post each question, together with the answers, to APHL's procurement website ([www.aphl.org/rfp](http://www.aphl.org/rfp)) within one business day of responding directly to the email sender.

## Scope and Approach

---

The organization or individual engaging in this project must provide the capabilities to work from the early stages of the course design through full development, including implementation and evaluation strategies.

APHL has included a draft of previously identified learning objectives and accompanying competencies, as well as the [MMWR Competency Guidelines for Public Health Laboratory Professionals](#) and the program framework and approach, for reference and upon which this program is based. This material may be found in the following RFP attachments:

- [Appendix A: Scientific Writing Comprehensive Curriculum Learning Objectives](#)
- [Appendix B: Program Framework and Approach](#)

The applicant will be expected to execute the following:

1. Provide a critical review of the partner-developed program design plan.
  - a. This will include advising on how learning objectives should be appropriately combined and broken out into separate eLearning modules. The learning objectives outlined in Appendix A do not reflect a 1:1 relationship of objective to expected modules. We expect modules to be organized in manner to prioritize flow and learner digestibility and defer to the instructional designer for guidance on how many modules are necessary to meet these goals.
2. Develop APHL supplied materials into a cohesive learning package to include:
  - a) Self-directed e-learning modules that include visual, audio and other media for learning and reinforcement of knowledge, as well as self-timed pacing of the material. The eModules should be developed using HTML5 for compatibility with APHL's website where they will be hosted.
  - b) A field learning guide relating to each eLearning module topic (main media presentations, activities, job tools, glossary of terms, and links to additional resources, materials for activities such as role plays and other exercises or activities);
  - c) An field instructor guide relating to each eLearning module topic (course agenda, details and key points to cover, media use instructions, guide to facilitating activities, cases and/or project work); and
  - d) A monitoring and evaluation plan with necessary tools (e.g., participant evaluation data collection tools in the field guides).
3. All materials must be developed with a professional skin that incorporates APHL branding (APHL logos and style guide will be provided).

See Program Framework and Project Approach (Appendix B) for additional details.

The program covers a wide range of concepts for course development and includes eight overarching research domain competency areas (see [MMWR Competency Guidelines for Public Health Laboratory](#)

[Professionals](#), Research Domain section). APHL will provide all content for the program and the applicant will design and develop the program content to address all nine competencies. APHL anticipates the material will be developed in up to three phases based on funding and time feasibility. The current maximum award of \$230,000 is to cover phase 1 through August 31, 2020. The ability to address additional phases will be funding permitting. Contingent on satisfactory work in Phase 1, the awardee of this RFP will be given the first right of refusal for Phases 2 and 3.

Phase 1 will focus on recently piloted topics from an in-person workshop and are more complete than topics listed in Phases 2 and 3. Proposals should include different, scalable options for the presentation of the content and provide a realistic timeline and deliverable expectations based on the priorities for Phase 1 listed in Appendix A. **Applicants should outline how many modules and learning objectives are feasible to cover with the available funding and time in their proposal.** Proposals will be evaluated for realistic assessments of time, scope and cost-effectiveness.

## Project Term and Award

---

APHL will deliver a written notice of award to the successful applicant. The successful applicant will receive funding through a contract agreement with APHL for a maximum amount of \$230,000. Funding is available for the period from January 6, 2020 through October 30, 2020.

APHL has responsibility for validating the accuracy and completeness of the content of the final product and all materials created.

## Proposal Submission

---

### Guidelines and Required Information

The applicant must ensure that APHL receives its letter of intent and its complete response by the due dates set out in the Anticipated RFP Schedule above. *APHL's evaluation team will not review incomplete applications.*

There is no designated response format or outline for responding to this RFP. However, regardless of the chosen format, an applicant's proposal must be limited to eight (8) pages of narrative and visuals. If an application exceeds this 8-page limit, only the first 8 pages will be sent to the evaluation team and scoring will be based solely on the portion of the proposal submitted for review. An application should have a font size of 11 points or larger and page margins of at least 0.5 inches. *Note:* Neither the Cost Proposal described below nor anything included as an appendix will count as part of the 8-page count (material included as an appendix will only be used as reference material and will not be reviewed as part of the evaluation process).

The applicant must include the following in their 8-page response:

1. A company profile;

2. A description of two (2) past learning/development activities that best reflect the applicant's work and relevancy to this project (examples of course materials for activities may be included as an appendix);
3. A description of the applicant's experience in producing training programs that included highly technical or scientific content (examples may be included as an appendix);
5. A description of organizational capacity and approaches to the following:
  - a) Producing training programs using multiple modalities;
  - b) Designing and developing competency based training; and
  - c) Designing training for a global, adult audience.
6. A description of what type of team will be assigned to this project, including a brief description of each person's role;
7. A brief description of the applicant firm's project management and instructional development processes including software and/or technology used for self-directed study module development;
8. A realistic timeline and number of learning objectives and modules that can be developed into both eLearning modules and field guides; and
9. A description of the applicant's proposed approach and understanding of the scope and content outlined in the RFP.

## Cost Proposal

The applicant should provide a detailed cost estimate and justification of costs. The cost proposal must be no longer than two (2) pages. No required format exists and the applicant can submit the cost proposal in the format of the applicant's choice.

The applicant should provide estimates for this RFP that hold some level of reasonable accuracy for time and cost based on the information provided. This includes proposing the number of learning objectives and modules that can be reasonably developed within the maximum budget and allotted time. APHL will work with the selected applicant to review and evaluate the proposed time and effort to allow for needed adjustment in the level of effort, depending on course complexity.

This RFP includes [Appendix B: Project Framework and Project Approach](#), to assist applicants in understanding the level of detail that APHL and partners have discussed in relation to this project. *Note:* Applicants are not required to use or reference anything outlined in Appendix B unless they would like to. APHL only provides this as supporting documentation.

## Evaluation

---

### Initial Review

APHL staff members or consultants under contract with APHL will conduct an initial review of all proposals for completeness. Incomplete proposals will not receive a formal evaluation.

## Evaluation Process

APHL will conduct reviews via a combination of teleconference and email communications between the evaluation team described below. An APHL Infectious Disease staff will coordinate the review process and the evaluation sessions.

The reviewers may request follow-up interviews with all or some of the applicants and, following these interviews, may request supplemental information on an applicant's proposal. These interviews and any supplemental information will clarify an applicant's capacity or experience in one or more of the evaluation criteria, or will help to explain other information contained in an applicant's proposal.

## Evaluation Team

APHL will assemble an evaluation team to review the competitive proposals and assess their relative qualities based on the Evaluation Criteria outlined below. This evaluation team will comprise of four reviewers: APHL's Respiratory Disease Program Manager, APHL's Infectious Disease Director and two CDC NCIRD staff.

## Conflicts of Interest

APHL will ask potential reviewers to complete and sign APHL's **Conflict of Interest Disclosure Statement** in order to disclose any real or perceived conflict of interest prior to the start of the evaluation process and to affirm that they have no conflict of interest that would preclude an unbiased and objective review of the proposals received. A copy of the disclosure statement and the related Fiduciary Responsibility and Conflict of Interest Policy is attached as Appendix D: Conflict of Interest Disclosure Form and Policy. APHL will not select reviewers with a perceived or potential conflict of interest. Once potential reviewers have been identified, APHL's Director, Infectious Diseases will have final approval over the review team's composition.

## Evaluation Criteria

The evaluation team will use the following criteria as a general overall framework in which to evaluate proposals:

- *Suitability of the Proposal* – The proposed solution meets the needs and criteria set forth in the RFP.
- *Instructional Designer Expertise* – Applicant shows knowledge of the subject by recommending and communicating appropriate technical and aesthetic solutions as evidenced by the proposal and references.
- *Instructional Designer Organizational Capacity* – Applicant has successfully completed similar projects and has the qualifications necessary to undertake this project. The applicant firm has appropriate staff to devote to the project within the timeframe needed.

- *Project Management* – Applicant shows experience and resources related to successful management of a similar program.
- *Value/Pricing Structure and Price Levels* – The price is commensurate with the value offered by the applicant.

Each member of the evaluation team will evaluate proposals against the questions or criteria found in Appendix C: Instructional Designer RFP Scorecard and will assign a numeric score from zero (0) (indicating a ‘poor’ response) to four (4) (indicating an ‘outstanding’ response) to reflect that reviewer’s assessment of the responsiveness of a proposal to each question or criterion. The evaluators will assign a score using the following categorizations:

- *Poor* (0 points) – The respondent’s proposed approach neither meets the baseline requirements set out in this RFP nor demonstrates more than a minimal understanding of the subject matter.
- *Fair* (1 point) – The respondent’s proposed approach does not meet the baseline requirements set out in this RFP but does demonstrate a baseline understanding of the subject matter.
- *Good* (2 points) – The respondent’s proposed approach meets the baseline requirements set out in this RFP and demonstrates the necessary understanding of the subject matter.
- *Excellent* (3 points) - The respondent’s proposed approach exceeds the baseline requirements set out in this RFP and demonstrates a deep understanding of the subject matter.
- *Outstanding* (4 points) - The respondent’s proposed approach greatly exceeds the baseline requirements set out in this RFP and demonstrates a thorough and comprehensive understanding of, or expertise in the subject matter.

The raw scores will be weighted in such a manner so that the 52 maximum possible raw score points will be converted into a maximum possible weighted score of 100 points.

## Post Evaluation Procedures

---

APHL staff will notify the selected instructional designer within ten (10) business days of completion of the evaluation, and APHL will post the name of the recipient to APHL’s procurement website, found at [www.aphl.org/rfp](http://www.aphl.org/rfp) on the same day. Unsuccessful applicants will receive notification of these results by e-mail within 30 days of the date that the winning/successful vendor is posted by APHL.

All applicants will be entitled to utilize APHL’s Appeals Process to formulate a protest regarding alleged irregularities or improprieties during the procurement process. Specific policy details are available on the procurement website.

## Conditions of Award Acceptance

---

The eligible applicants must be able to contract directly with APHL or have an existing relationship with a third party organization that can contract directly with APHL on behalf of the applicant. Applicants must agree to comply with expectations outlined in the appendices.

If additional funding becomes available and the awardee is still available to do additional work, APHL will contract as a sole source to the original Phase 1 awardee to complete the development of materials relating to the remaining learning objectives.

## General Considerations

---

This RFP is neither an agreement nor an offer to enter into an agreement with any respondent. Once application evaluation is complete, APHL may choose to enter into a definitive contract with the selected applicant or it may decline to do so.

APHL must ensure that the selected respondent is neither suspended nor debarred from receiving federal funds and that the respondent meets any other funding eligibility requirement imposed by the Cooperative Agreement. APHL's determination of whether the respondent is eligible to receive Cooperative Agreement funding will be definitive and may not be appealed. In the event that APHL determines that the selected respondent is ineligible to receive Cooperative Agreement funding, APHL will nullify the contract or will cease negotiation of contract terms.

Each respondent will bear its own costs associated with or relating to the preparation and submission of its application. These costs and expenses will remain with the respondent, and APHL will not be liable for these or for any other costs or other expenses incurred by a respondent in preparation or submission of its application, regardless of the conduct or outcome of the response period or the selection process.

## Appendix A – Scientific Writing Comprehensive Curriculum Learning Objectives

---

### Scientific Writing Comprehensive Curriculum Learning Objectives

#### Developed by:

Association of Public Health Laboratories (APHL)

#### Appendix A Key Points:

- The drafted learning objectives outlined in the table below are based on the MMWR Competency Guidelines for Public Health Laboratory Professionals (primarily the Research Domain Competencies).
- Some of the competencies listed are highly related and may be merged into single modules, while others may stand on their own. It is up to the discretion of the awardee to advise the organization of competency-based modules and corresponding materials.
- APHL and CDC have access to existing materials (e.g., PPT presentations) that correspond to each of the learning objectives outlined in the table. Upon initiation of the work, APHL will provide the awardee with additional information regarding which sets of course material contains relevant information pertaining to each of the learning objectives, as well as the actual existing materials.
- Development of the proposed modes of delivery outlined in the table is in the context of the Scientific Writing Workshop. Ultimate discretion is up to the awardee.
- The phases/priorities are *suggestions*; however, applicant proposals should advise and propose realistic objectives and deliverables with the time frame and budget provided for Phase I.

## Scientific Writing Workshop and Comprehensive Curriculum

### Learning Objectives, Competencies, & Mode of Delivery

Overarching Topics	Phase/Priority	Learning Objectives Overarching goals for participants of the workshop	Associated Core Competencies Desired knowledge and skills the participants will take away from the workshop	Existing Materials Available	Proposed Mode of Delivery (presentation, exercise, panel, webinar, etc.)
<b>Meeting and Conference Presentations</b>	Phase 3	Present research to colleagues/discipline-wide audiences.	Deliver an oral presentation using non visual aids based on your research that is clear, audible, well-rehearsed, and suitable for the audience.	Yes	eModule, field presentations
			Deliver an oral presentation using visual aids based on your research that is clear, audible, well-rehearsed, and suitable for the audience.	Yes	eModule, field presentations
			Design and deliver a presentation using software (such as PowerPoint, Keynote, Prezi) based on your research that is clear, audible, well-rehearsed, and suitable for the audience.	Yes	eModule, field presentations
<b>Manuscript Preparation</b>	Phase 1	Describe the scientific writing process and its key stages.	Reflect on what constitutes a research problem or question to be addressed in a scientific manuscript.	Yes	eModule, field presentations, and field exercise
			Describe the principles of clear scientific writing.	Yes	eModule, field presentations
			Describe the purpose and structure of each of the sections of a scientific article: <ul style="list-style-type: none"> <li>• Title</li> </ul>	Yes	eModule, field presentations,

			<ul style="list-style-type: none"> <li>• Abstract</li> <li>• Introduction and Background</li> <li>• Materials &amp; Methods</li> <li>• Results</li> <li>• Tables &amp; Figures</li> <li>• Conclusion/Discussion</li> <li>• Acknowledgements</li> <li>• Citations/References</li> </ul>		and field exercise
			Develop a manuscript outline to guide your writing and your research and to organize a scientific argument.	Yes	eModule, field presentations, and field exercise
			Conduct comprehensive literature reviews and identify, evaluate, and cite references appropriately and efficiently.	Yes	eModule, field presentations
			Describe the purpose and components of an abstract.	Yes	eModule, field presentations, and field exercise
	Phase 1	Demonstrate an understanding and ability to analyze and present data.	Analyze and summarize your research data.	Yes	eModule, field presentations
			Assemble and populate appropriate tables and figures.	Yes	eModule, field presentations, and field exercise
<b>Manuscript Revision</b>	Phase 1	Analyze and review scientific manuscripts in terms of key message, consistency, and justification.	Summarize the Rules of Scientific Writing: <ul style="list-style-type: none"> <li>• Flow</li> <li>• Clarity &amp; succinct writing</li> <li>• Abbreviations</li> <li>• Past, present, and future tense</li> <li>• Passive vs. active voice</li> </ul>	Yes	eModule, field presentations, and field exercise

			<ul style="list-style-type: none"> <li>• Third vs. first person</li> <li>• Topic sentences &amp; paragraph structure</li> <li>• Empty phrases</li> <li>• Specify</li> <li>• Parentheses</li> <li>• Proofreading</li> </ul>		
<b>Manuscript Publication</b>	Phase 2	Outline the publication process.	Describe the steps involved in selecting an appropriate journal.	Yes	eModule, field presentations
			Describe the steps involved in and the essential components of submitting a manuscript.	Yes	eModule, field presentations
			Describe the steps involved in revising manuscript based on comments.	Yes	eModule, field presentations
			Differentiate legitimate vs. predatory publishers and publications.	Yes	eModule, field presentations
<b>Manuscript Peer Review</b>	Phase 3	Analyze and review scientific papers in terms of key message, consistency, and justification.	Informally critique manuscripts submitted for peer review.	Yes	eModule, field presentations, and field exercise
			Participate in the peer review process as a formal reviewer	Yes	eModule, field presentations
<b>Translating Research Findings into Public Health Practice</b>	Phase 3	Describe/direct implications of research findings on public health practices	Understand the value and utility for translating laboratory science to written publications	Yes	eModule, field presentations
<b>Ethics in Scientific Writing</b>	Phase 2	Reflect on the ethics in scientific writing	Reflect on the benefits of working in teams in scientific writing and describe the rules of co-authorship/acknowledgements.	Yes	eModule, field presentations

			Define the different types of plagiarism and avoid plagiarism.	Yes	eModule, field presentations
			Explain what is at stake if scientific research/information is communicated poorly.	Yes	eModule, field presentations

# Program Framework and Project Approach

## Instructional Design Planning

To help frame the required level of detail, respondents should be thinking about the information outlined below as they provide their estimates on cost, deliverables and proper staffing.

**NOTE: RESPONDENTS ARE NOT REQUIRED TO USE OR REFERENCE THIS INFORMATION; IT IS ONLY INCLUDED AS A GUIDANCE RESOURCE.**

### Background and rationale

Laboratories are an essential and fundamental part of health systems and play a critical role in the detection, diagnosis, treatment and control of diseases. Publishing of scientific data is essential to improve dissemination of research and enhance knowledge sharing in order to advance science and its translation to practice in public health. However, consistent and robust publishing among laboratory staff is not always present, and is particularly limited in many low and middle-income countries. The scientific community needs strong scientific communicators and writers to perpetuate gold standard laboratory practice methodology, techniques, and findings. Thus, comprehensive and standardized guidelines are needed to train laboratory leaders who are able to write and publish scientific manuscripts.

Laboratory leaders broadly acknowledge the requirement for meaningful education and training in scientific writing skills, though many have not had sufficient or specific training in these areas. To effectively address this gap, a comprehensive, competency-based learning programme applicable on both a domestic and global scale is needed to provide the foundation for training programmes for laboratory leadership and management.

### Target Audience

The Scientific Writing Comprehensive Curriculum target audience is public health laboratorians from diverse geographic and cultural backgrounds (incl. language, etc.). Laboratory staff – particularly those from underserved countries with underrepresentation in peer-reviewed journals, who do not have extensive scientific writing experience, and who can benefit from comprehensive scientific writing training as deemed by their Laboratory Director – will be targeted (i.e., laboratorians considered “beginners” per the competencies outlined in the Research Domain section of the [MMWR Competency Guidelines for Public Health Laboratory Professionals](#)). The goal is for laboratorians deemed at the “beginner” level of proficiency (based on the competencies) to transition to “competent” and possibly beyond (to “proficient” and “expert”) throughout the modules of this curriculum.

## Available Course Materials

Existing scientific writing training materials (e.g., PPT presentations), some of which were utilized for the Scientific Writing Workshop, will be provided by APHL. Materials exist that pertain to all learning objectives outlined in Appendix A. The awardee will rely on existing content as the subject matter foundation to develop the course content by reorganizing and repackaging, as appropriate.

## Timetable

*This section defines the project timetable.*

### Project Overall Timeline (estimated)

Phase	2019 Q4	2020 Q1	2020 Q2	2020 Q3	2020 Q4
Analysis (APHL & CDC)	Sep – Mar 2020				
Design (Contractor)		Jan – March 2020			
Development (Contractor)			Apr – Jul 2020		
Implementation (Contractor)					Aug – Oct 2020

## Project Approach

### 1. Outline content and identify course materials.

- a. Between now and the contract start date, the partners aim to identify all existing course materials and identify gaps in available materials and program content. The instructional designer should be prepared to review partner-developed materials and plans and make recommendations on content delivery and methodology.
- b. Course materials may include:
  - i. eLearning modules
  - ii. PowerPoints or other electronic presentations
  - iii. Audio or video files
  - iv. Quizzes
  - v. Group exercises
  - vi. Case studies
  - vii. Photographs, Graphs, other graphics
  - viii. Handouts/resources
  - ix. Pre-work assignments

2. Select specific learning strategies.

The instructional designer should be prepared to review partner-developed materials and plans and make recommendations on content and methodology.

3. Create a project plan and timeline.

With enough information generated from tasks 1 and 2, the instructional designer should prepare a plan and timeline for the design and development of the learning package. Minor adjustments in the proposed costs and resources can occur at this time.

4. Draft overall program design and storyboards.

The instructional designer will prepare a document describing the competency specific design modalities. Storyboards, as needed and/or appropriate are requested allowing subject matter experts to confirm the content, concept delivery and evaluate success in meeting the competency goals.

5. Complete final design and program development approaches.

The instructional designer will confirm final design and associated schedule with APHL and partners.

6. Re-design/re-package materials.

- a. The instructional designer will undertake development of the agreed upon materials with APHL provided content and input from APHL Subject Matter Experts as required
- b. Revise/adapt existing content to audience

7. Build and deliver the learning guide and accompanying instructor guide.

The instructional designer will create learning guides and instructor guides as appropriate.

8. Build and deliver a monitoring and evaluation plan.

- a. The instructional designer will provide a monitoring and evaluation plan, including any tools necessary for program evaluation.
- b. Note: The awardee will not be expected to conduct an evaluation as part of this contract. Rather, the awardee will be expected to create evaluation tools as part of the curriculum package that future course instructors can use to conduct evaluation of the course material.

9. Create list of resources

The instructional designer will provide a list of collated resources used in the creation of all materials.

## Instructional Methods

Method	Purpose	Rationale
--------	---------	-----------

Case Studies	Allow participants to discover certain learning points themselves	To apply new knowledge to a specific situation To practice problem-solving skills
Games	Provide non-threatening way to present or review course material	To help grasp total program content To present dry material in an interesting way To add a competitive element to the session
Survey Instrument	Provide feedback; self-assessment	To identify areas for improvement To establish a baseline for future growth
Lectures	Convey information when interaction or discussion is not desired or is not possible	To convey information quickly within a short time To communicate the same information to large numbers of people To provide basic information to a group that is not knowledgeable
Mental Imagery Exercises	Help participants increase understanding, gain insight	To address affective learning To stimulate thinking, imagination To replace role playing
Observations	Certain participants act out or demonstrate behaviors, tasks, or situations while others observe and give feedback	To show the group how to perform a procedure or apply a skill or behavior To increase participants' observation, critiquing, and feedback skills To demonstrate behavior modeling
Role Plays	Help participants practice skills used in interactions	To practice newly acquired skill To experience what a particular situation feels like To provide feedback to participants about their behavior
Simulations	Recreate a process, event, or set of circumstances, usually complex, so that participants can experience and manipulate the situation without risk and then analyze what happened	To integrate and apply a complex set of skills To elicit participants' natural tendencies and provide feedback on those tendencies To provide a realistic, job-related experience
Small Group Discussions	Offer opportunities for participants to express opinions, share ideas, solve problems, interact with others	To generate ideas To find out what participants think about a particular subject To increase level of participation To encourage group interaction and build group cohesiveness
Task Exercises or Activities	Allow participants to work with the content in small groups	To practice and test participants' understanding of a concept or process To promote group collaboration To increase participants' confidence in their ability to apply learning on the job
Writing Tasks	Help participants reflect on their understanding of concepts, information, ideas	To provide for individual input

## Appendix C – Instructional Designer RFP Scorecard

The following table is a copy of the scorecard that will be used to evaluate RFP responses. Reviewers will score each question on a scale from 0 (poor) to 4 (outstanding). The raw scores will be weighted in such a manner so that the 52 maximum possible raw score points will be converted into a maximum possible weighted score of 100 points.

Scoring:	Poor: 0	Fair: 1	Good: 2	Excellent: 3	Outstanding: 4
Category	Criteria			Score	Comments
<b>Suitability of the Proposal:</b> Does the applicant's proposal demonstrate an understanding of the operational need of the project and follow application instructions?	To what degree did the proposal meet the overall objectives of the project?				
	Did the applicant follow instructions - i.e., stay in page count, include required information?				
	Is the information presented in a clear, logical manner and is well organized?				
	Did the applicant provide references for two former or current clients?				
	<b>Section Total</b>				
<b>Instructional Designer Expertise:</b> Does the applicant's proposal demonstrate sufficient experience in course design and development to serve as the instructional designer?	Did the applicant list and articulate two past learning and development activities they produced that best reflect their work and relevancy to this project? Are the activities articulated at a quality level that APHL seeks?				
	Did the applicant thoroughly explain and have experience in producing training programs for non-profit and/or global projects?				
	Does the applicant have experience in recommending and communicating appropriate technical and aesthetic solutions to course design challenges as evidenced by the proposal and references?				
	Is the applicant's existing knowledge and experience in this field as described in the proposal relevant to the project? (provided company profile, length of time in business and experience with designing and developing competency-based training)				
	<b>Section Total</b>				
<b>Instructional Designer Organizational Capacity:</b> Does the applicant have the appropriate staff to develop the product in the time frame needed?	Does the applicant have organizational capacity to produce learning and development training programs for in-person and online courses?				
	Did the applicant outline an appropriate team to work on this project? (i.e. web designers, developers, instructional designers)				
	<b>Section Total</b>				

<b>Project Management:</b> Does the applicant have experience in project management?	Does the applicant demonstrate project management experience relevant to completion of international program of this magnitude?		
	Does the applicant have instructional development processes in place to achieve program goals according to a set schedule?		
	<b>Section Total</b>		
<b>Value/Pricing Structure and Price Levels:</b> Is the price commensurate with the value offered by the applicant?	Did the applicant hold some level of reasonable accuracy for time and cost based on the nine competency targets?		
	<b>Section Total</b>		
	<b>Total Score</b>		

Appendix D – Conflict of Interest Disclosure Statement and Policy (For Completion by Reviewers Only – Applicants Do Not Need to Complete)

---

Association of Public Health Laboratories

## Conflict of Interest Disclosure Statement

**Applicability:** Disclosure of the following information is required of all Officers, Directors, committee members, staff members and other volunteers who have been designated and who have accepted responsibility to act on behalf of APHL ("APHL Personnel"). Please answer the following questions and, where indicated, include the same information for your immediate family members (your parents, your spouse or partner, your children and your spouse/partner's parents).

APHL will keep your completed disclosure statement in the corporate records of the association.

1. Please list the name, address, phone number, email address and type of business of your current employer. If you are self-employed, please note that below and provide us with the address, phone number, email address and type of business you operate.
- 
- 
- 

2. Do you, or does any family member, currently serve as an officer, director, committee member, or other volunteer (or work as an employee of or a paid consultant to) any organization serving the interest of laboratory science or public health laboratories other than APHL or your state or local laboratory?

**Yes**                       **No**

If yes, please list the organization(s) and provide detail on your or your family member's interest or position in the organization(s).

---

---

---

---

3. Do you, or any family member, have an existing or potential interest in, or compensation arrangement with, any third party providing goods or services to APHL, or with which APHL is currently negotiating?

**Yes**                       **No**

If the answer is yes, please provide the name of the organization below and describe in detail the nature of the position held.

---

---

---

---

4. Please note any other financial or business interest you may have with any organization serving the interests of public health laboratories.

**If you have none, please check this box:**

5. Do you, or does any family member, have any other interest or affiliation that is likely to compromise your ability to provide unbiased and undivided loyalty to APHL, or that could come in conflict with your official duties as an Officer, Director, committee member, staff member or other volunteer who has been designated and who has accepted responsibility to act on behalf of APHL?

**Yes**

**No**

If you answered yes, please describe in detail below the nature of each such interest or affiliation.

---

---

---

6. If you are currently aware of any actual or possible conflict of interest that might otherwise hamper your ability to serve APHL to your best ability and with the highest degree of care, loyalty and obedience – including any potential conflict you or a family member may have with one or more of the RFP applicants – please describe them in detail below.

---

---

---

7. Do you agree that so long as you are an Officer, Director, committee member, staff member or other volunteer who has been designated and who has accepted responsibility to act on behalf of APHL you will immediately disclose to the other Directors and/or Officers or, for staff members, the Executive Director and/or General Counsel the nature of any interest or affiliation which you may hereafter acquire, which is in or is likely to become in conflict with your official duties with APHL?

Yes

No

**YOU MUST READ THIS SECTION AND THEN SIGN BELOW**

I acknowledge that I have received and read APHL's Fiduciary Responsibility and Conflict of Interest Policy (the Policy). I have listed all my relevant fiduciary responsibilities and affiliations, and I have identified any actual or potential conflict of interest on this Disclosure Statement and I agree to abide by the Policy. I understand that it is my responsibility to inform APHL in writing of any change in circumstances relating to the Policy and this Disclosure Statement.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

# APHL Fiduciary Responsibility and Conflict of Interest Policy

## 1. Policy Statement and Purpose

The members of the APHL Board of Directors understand the importance of serving APHL to the best of their ability and with the highest degree of obedience, loyalty and care. Accordingly, the Board adopts the following policy for APHL Officers and Directors, all staff, committee members, and other volunteers who have been designated and who have accepted responsibility to act on behalf of APHL ("APHL Personnel").

## 2. Individual Duty and Annual Disclosure

APHL Personnel will avoid any conflict of interest with APHL. APHL Personnel will not profit personally from their affiliation with APHL, or favor the interests of themselves, relatives, friends or other affiliated organizations over the interests of APHL. As used in this Policy, "Conflict of interest" includes any actual, apparent, and potential conflict of interest.

Upon commencing service with APHL, each APHL Personnel will file with the Board an annual statement disclosing all material business, financial, and organizational interests and affiliations they or persons close to them have which could be construed as related to the interests of APHL or the profession of public health laboratory science. Each APHL Personnel has an obligation to make an additional disclosure if a conflict of interest arises in the course of the individual's service to APHL, whether arising out of his/her employment, consulting, investments, or any other activity. These disclosures will be documented promptly in writing and recorded in the Board minutes and corporate records.

## 3. Procedure

Whenever APHL considers a matter, which presents an actual, apparent, or potential conflict of interest for APHL Personnel, the interested individual will fully disclose his/her interest in the matter, including the nature, type, and extent of the transaction or situation and the interest of the individual or that individual's relatives, friends or other affiliated organizations. The Board, after consultation with counsel as appropriate, will determine whether an actual and material conflict exists and, if so, what is the appropriate course of action under this policy and the Board vote will be recorded in the minutes.

Any Board member having a conflict of interest must either (i) voluntarily abstain from and be disqualified from participation in all deliberation and voting on all Board actions relating to the situation or matter that gives rise to the conflict of interest, or (ii) ask the Board to determine whether an apparent or potential conflict of interest is considered by the Board to be an actual and material conflict. In the event that the Board member in question requests that the Board evaluate the apparent or potential conflict, that Board member will abstain and be disqualified from participating in (and voting on) the determination of whether the issue presents an actual and material conflict. If the Board determines that an actual and material conflict exists, the Board member in question will abstain from

all voting on, and will be disqualified from participation in all deliberation concerning all Board actions relating to the conflict of interest. The vote will be recorded in the minutes.

These procedures will neither prevent the interested individual from briefly stating his/her position on the matter, nor preclude him/her from answering pertinent questions of Board members, since his/her knowledge may be of assistance to the Board's deliberations.

APHL Personnel must be cautious and protective of the assets of APHL and insure that they are used in the pursuit of the mission of APHL. The association's policy requires APHL Personnel to avoid transactions in which APHL personnel may have a significant financial interest in any property which APHL purchases, or a direct or indirect interest in a supplier, contractor, consultant, or other entity with which APHL does business. The Board, after consultation with counsel as appropriate, will determine whether an actual and material conflict exists and, if so, determine whether the transaction is nonetheless favorable to APHL before considering whether to approve it.

#### 4. Other Duties and Obligations

Whenever any APHL Personnel discovers an opportunity for business advantage that is relevant to the activities of APHL, the opportunity belongs to APHL and the individual must present this opportunity to the Board. Only once the Board determines not to pursue the matter and relinquishes the opportunity may the individual consider it a matter of possible personal benefit.

APHL Personnel may not accept favors or gifts exceeding \$75.00 from anyone who does business with APHL.

All APHL Personnel will keep confidential those APHL matters designated confidential. APHL Personnel are prohibited from disclosing information about APHL to those who do not have a need to know or whose interest may be adverse to APHL, either inside or outside APHL, and are prohibited from using in any way such information for personal advantage to the detriment of APHL.

All APHL Personnel who participate in APHL activities, including committee activities and international consultation activities, must be adequately prepared to fully participate as their position descriptions require and will do so in accordance with the applicable laws and regulations of their respective state or territory and APHL's Articles of Incorporation, Bylaws, and corporate policies. The APHL Board will read and understand the association's Articles of Incorporation, Bylaws, corporate policies and financial statements, and routinely verify that all state, federal, and local tax payments, registrations and reports have been filed in a timely and accurate manner.

Board members will never exercise authority on behalf of APHL except when acting in meetings with the full Board or the Executive Committee or as authorized by the Board. If any member of the Board has significant doubts about a course of action of the Board, he or she must clearly raise the concern with the Executive Director and the Board and, when appropriate, seek independent expert advice.