APHL.ORG WEBSITE REBUILD/REDESIGN
Request for Proposals

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Summary of RFP

The Association of Public Health Laboratories (APHL) intends to fully rebuild their website, aphl.org, by end of 2025, including implementation of a new Content Management System (CMS). This new website will be clean and modern, with a focus on accessibility and providing an elevated user experience.

APHL seeks to retain the services of an expert website developer/designer to:

1) Conduct a thorough needs assessment on the current website and make recommendations for improvements,
2) Help identify a new CMS platform,
3) Design, build and launch a new website.

This RFP provides a background of our organization and describes the purpose of the site, its desired functionality and specific requests relating to the proposal. We understand that details may be subject to change upon vendor recommendation and/or research of more optimal solutions. In your proposal, please feel free to suggest alternatives. Information requested includes summary of relevant expertise, process, timeline and cost.

Questions from prospective vendors can be found in the Applicant Questions section.

Please limit the proposal to 20 pages; appendices that exceed this limit are allowed but information contained in the appendices may not be given equal attention.

Key Dates:

- Informational Call: November 1, 2023: Watch a Recording of the Info Session
- Letter of intent due: November 3, 2023
- Last day for questions: November 10, 2023
- Final proposals due: November 28, 2023
- Finalist presentations: December 13-15, 2023

Modifications to RFP Since Original Posting

- Nov. 2: Questions: Added Info Session Recording and Applicant Questions Section (page 15)
- Nov. 7:
  - CMS Scope of Work: Changed requirement of providing “up to five” to “two to five” viable CMS options.
  - Maintenance Scope of Work: Removed “archive old website for two years” requirement.
  - Proposal Requirements: Updated page limit to 20 pages, plus an appendix as needed. Clarified that CMS recommendations or detailed side-by-side platform comparisons are not required in the proposal.
  - Evaluation Criteria: Increased weight of association experience line item.
  - APHL’s External Sites (Appendix, Page 19): Clarified site integration/migration needs.
- Nov 17:
  - Schedule: Proposal Due Date updated to Nov. 28: Finalist presentations moved to Dec. 13-15.
  - Questions: Updated Applicant Question section to include responses to all questions received by Nov. 10.
  - Needs Assessment Scope of Work: Specifically highlighted content audit in scope.

RFP Last Updated: November 17, 2023
Background

About APHL

The Association of Public Health Laboratories (APHL) is a national, non-profit organization that represents state and local governmental health laboratories in the United States. Its members, known as “public health laboratories,” monitor and detect health threats to protect the health and safety of Americans.

APHL collaborates with laboratory and public health partners to ensure effective monitoring, detection and response to health threats. It works closely with federal agencies, including the US Centers for Disease Control and Prevention, Health Resources and Services Administration, Food and Drug Administration and Environmental Protection Agency to develop and execute national health initiatives. During public health emergencies, APHL operates as a coordinating center for laboratory response. APHL’s visibility greatly expanded during the COVID-19 pandemic, as public health laboratories took on an unprecedentedly public role in the early days of testing.

APHL also works around the world to develop effective national laboratory systems and expand access to quality diagnostic testing services. With over 60 years’ experience managing public health laboratory programs, it is recognized internationally as a leader in laboratory science and practice. APHL has offices in 10 countries (and counting) and supports ministries of health with consulting services, including laboratory strategic planning, twinning partnerships, laboratory information management systems, quality assurance and training.

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 to prepare for outbreaks and other public health emergencies.

APHL is organized under the laws of the District of Columbia, with its headquarters office in Bethesda, MD. APHL is recognized as tax exempt in the United States under Section 501(c)(3) of the US Internal Revenue Code.

Who We Serve

APHL’s core members are state and local governmental health laboratories in the United States, including public health, environmental, agricultural science and food safety laboratories. Representatives from federal agencies, nonprofit organizations, corporations and interested individuals also participate in the association. International participation is expanding in response to the globalization of disease and APHL’s active global health program. APHL has over 130 member laboratories, 50 corporate partner organizations and 1,500 individuals in its network.

About the Current APHL Website

Purpose

The APHL website is a platform for pursuing many of the priorities on the association’s strategic map, though it most clearly supports the following items:

- Clearly define the impact of public laboratory system services on the public’s health
- Educate key audiences about the role and impact of the public health laboratory system
- Equip the public health laboratory workforce to be adaptable to change

Additionally, as part of APHL’s Cooperative Agreement with CDC, the association is required to make public summaries of its work and any research findings (via surveys, etc.); the website is the logical and practical place for these data to live.
Analytics and Traffic Drivers

Snapshot of Calendar Year 2022

- Pageviews: 797,889 total, 641,945 unique  
  (Average views per month: ~66,500 total; 53,500 unique)
- Average Time on Page: 00:01:35
- Bounce Rate: 8.17%
- % Exit: 46.25%

Recent Drivers of Traffic to APHL.org

- COVID-19 testing information and resources: APHL’s visibility greatly expanded during the COVID-19 pandemic, as public health laboratories took on an unprecedentedly public role in the early days of testing. We built out an extensive educational subsite that could meet the needs of both the laboratory staff doing the testing, and the media and policy makers who needed to understand the testing process.
- Career Pathways: A new workforce development program, Career Pathways in Public Health, was launched mid-2022.
- Meetings and Trainings: Events such as the Annual Conference or our Newborn Screening Symposium always drive a lot of traffic to the site, but since 2021 the major meetings have had a virtual component, allowing a wider audience to register and attend.
**Audience and Content**

We have three main audiences:

1. Member laboratory staff, industry partners
2. APHL Career Pathways participants; early career fellows and interns placed in member laboratories, their mentors (laboratory staff) and our academic partners.
3. Informed public, such as state and federal funders/partners, policy makers, and the media

Our content caters to both public and technical audiences, and can roughly be broken down into two categories:

- **What the work is:**
  - High-level summary of testing-related health concerns
  - Information about work APHL does (ex., networks that APHL supports or programs we have implemented to support our member laboratories)
  - Information about what laboratories do on a topic (ex., how labs monitor and identify something, survey reports, etc.)
  - Policy/advocacy priorities of the community
  - Information about the Career Pathways program (ex., descriptions of programs, how to apply, etc.)

- **How to do the work:**
  - Technical information and resources for implementing testing, services
  - Training, conferences and events
  - Communities of practice (via CollABorate platform, a connected external microsite)
  - Resources for Career Pathways program participants (ex., forms, handbooks, etc.)
  - Member-developed resources for methods or protocols (restricted access)

The content above is presented within webpages, but also within documents (usually PDFs) hosted on the site. These documents are both official publications (reports, fact sheets, etc.), as well as more ad-hoc documents (flyers, agendas, etc.) that are linked to for more information. We also share and promote content from external sites, such as the [Annual Report](#), [Lab Matters magazine](#) and the [APHL blog](#).

**Site Infrastructure and Management**

**Current CMS and Design History**

The website is built on Microsoft SharePoint 2013 with customized styling sheets and workflows. The website has single sign-on with our association management system (AMS), MC Trade, which helps with user and resource access management. The current website structure allows for public and restricted access based on groups and it also allows for data collection via forms. The last substantial redesign was in 2016; this brought it relatively up to date but didn’t really “modernize” the site.

**Site Management**

The website is primarily managed internally, with a division of labor that spans three groups:

- Information Systems team manages site structure/code-based tasks and any customization needs
- Marketing and Communications team oversees content and site organization, image management, etc.
- Programmatic staff responsible for maintaining content under their team/group’s sub site(s); only have editing rights to their specific site.

It is essential that APHL retains the ability to directly manage/manipulate the site content, rather than relying on an outside vendor for all changes.
Site Permissions/Access
There are some features on the website that are only accessible when signed in; accounts are free, but permissions vary by need/type of access. Can include lists or whole pages. Examples:

- **MyAPHL page:** sign-in required to access page, shows an individual’s APHL resources, communities, etc.
- **Member Resource Center:** This list displays member-generated resources, so access is restricted to those with the “member benefits” tag on their MC Trade profile.

External Sites
APHL has several external sites/platforms beyond the main aphl.org site. Unless otherwise noted, these sites have a single sign-on via MC Trade which allows for continuity/interoperability; a new website would need to retain existing single sign-on capabilities.

We have no plans to remove MC Trade as our AMS. The other external sites do not necessarily need to be part of a website overhaul, but consolidation might be appropriate for some platforms, such as the Blog and Annual Report.

See Appendix for a list of external sites.

Current Challenges

- **Lack of a grand strategy/vision for the website**
  - Content is produced for multiple audiences by multiple programs, so style and content does not feel consistent across the site
  - No broad SEO strategy
  - No systemic content monitoring, review, archiving (webpages, documents, publications, links, etc.), so content can easily become outdated
  - Challenge to publicize or prioritize member resources (the “how to do the work” items) while still maintaining engagement with our wider post-COVID audience (“about the work”)

- **Sub-par user experience**
  - Site navigation is not intuitive, and information silos require many click throughs to find what they need
  - Site was not built with accessibility in mind

- **Sub-par design capabilities**
  - Rigid formatting options and site/page structure
  - Not mobile friendly: non-adaptive/scalable images, page header and menu take away space from content
  - Photo/image integration into main text fields is clunky, not scalable or dynamic
  - No ability to have dynamic/interactive graphics
  - Limited support for advertisements
  - Difficult to adapt to audience needs and new technology without building new custom-coded features
About the Project

Our Vision

APHL aims to create a thoughtfully designed website that embodies the APHL brand and the qualities that make it unique: leading-edge science, innovative programs, quality service and high standards of excellence (See Appendix for full branding summary), and addresses the major challenges experienced with the current site. The new site will:

- Have clearly defined audiences and makes it simple to differentiate between audiences/needs (such as “about the work” and “how to do the work” content or resources)
- Have an intuitive user experience, with clear navigation and quick access to essential resources; ideally users will be able to find the information they seek in three clicks or less
- Be secure, fast and have large storage capacity
- Allow for design and maintenance flexibility to quickly respond to time-sensitive situations
- Be adaptive (mobile-friendly), with the ability to incorporate more dynamic or interactive elements.

Scope of Work

This project will be broken down into six stages of work:

1. Website Needs Assessment
2. CMS Selection
3. Website Design
4. Website Build
5. Website Launch
6. Maintenance

These stages do not have to happen in distinct succession, though each stage should build on the previous stages. Below is our projected scope of work, though details may be subject to change upon vendor recommendation and/or research of more optimal solutions. In your proposal, please feel free to suggest alternatives.

Website Needs Assessment

The vendor will conduct a content audit on existing site and solicit input from key informants within the association’s staff, members and partners to identify audience needs. The findings from these assessments will inform CMS selection and website organization and design concepts:

- Identification of aphl.org’s strengths/successes and weaknesses/challenges, including, but not limited to:
  - Site structure
  - Content organization
  - User experience
  - Navigation
  - Site management
- Clarification of the website’s overarching purpose
- Definition of key audiences and design/organization suggestions for best serving their conflicting needs
- Options to address or improve major weaknesses/challenges in new website
- Assess options for re-incorporating select external sites into new website
CMS Selection
The vendor will help the APHL Web Workgroup select an appropriate CMS platform for the site, based on the findings from the needs assessment and administrative/maintenance needs.

Please note that there is a preference to avoid open-source CMS options, such as WordPress (see Applicant Questions section for more information on why). They are not off the table, but we will need to be able to compare them to a viable non-open source option.

The vendor will:

- Identify two to five viable options for a new CMS platform
- Present pros/cons for selected CMS platforms to APHL Web Workgroup; the Workgroup will choose top platforms for further review
- Conduct demonstrations with APHL Web Workgroup for their top-choice CMS platforms.

Website Design

- Site Architecture
  - Produce site map of current website
  - Produce up to three high-level site maps for new site (depending on scope of organizational changes)

- Accessibility and User Experience (UX)
  - Site must be 508 compliant
  - Use UX principles to guide design choices

- Navigation
  - Provide outlines (up to 3) for site navigation organization
  - Provide wireframes (up to 3) for site navigation design options, including mobile view

- Wireframes
  - Master page layout (header/footer, global navigation, other universal elements)
  - Individual page layouts (up to 8), such as:
    - APHL.org Home Page (L1)
    - Subsite home page (L2)
    - Standard content pages (L3); up to three template options
    - Blog
    - Specialty content pages (e.g., Gallery or resource lists, interactive documents, event sites w/options for meeting-specific branding)
  - Mobile view layouts for L1, L2 and L3 pages

- Design Concepts
  - Provide three design concepts for L1, L2 and L3 pages, for desktop and mobile view.
  - Design concept for blog (if merging into new site), with social media integration
  - Include several rounds of revisions

- Component Blocks
  Identify options for up to 20 customizable or interactive design elements (webparts, plug-ins, etc.), such as:
  - Featured content (e.g., image carousel, 2nd tier highlighted content)
  - Featured/promoted resources, stories (e.g., filterable resource lists (images, documents, links, etc.), blog stories, publications, social feeds, upcoming events, etc.)
  - Dynamic content options (e.g., expandable/collapsible sections, forms, surveys, applications, dashboards, maps, event registration
  - Graphics (e.g., icons, images, video, etc.)
Website Build

- Infrastructure and Security
  - Provide staging and production environment
  - Plugins to be updated in staging environment and pushed to production after testing
  - Cookie Management and custom acknowledgment messages
  - Integrate with APHL’s AMS (MC Trade)
    - Single sign-on capability with external sites (at least the ones that already have this feature)
    - Ability to use AMS data to manage access to areas of the site
  - Provide a security mechanism to protect CMS
  - Provide back-up solutions for entire database
  - Provide versioning history for page updates and if applicable approval workflow before publishing
  - Provide role-based access control to CMS – if possible, the ability to create custom roles
  - Provide mechanism to integrate with APHL’s data collection systems (such as forms or Qualtrics, or embedding iframes)
  - Testing and implementation of Google Analytics, Google Tag Manager, and Google Search console in production environment.

- Development and Production
  - Determine site hosting needs; APHL is not limited to current hosting infrastructure
    - If in-house hosting is recommended, provide system requirements for optimal performance
    - Ensure optimal page load time
  - Install and configure staging and live environments

- Design Implementation
  - Wireframe/design review and recommendations as needed
  - Develop elements for and subsequently build templates for the page layouts (L1, L2, L3s, etc.) and up to 20 component blocks in the CMS
  - Initial quality assurance for responsiveness, along with other accessibility, feature, bug and user-flow testing
  - Create workflows/guidelines for page updates and image uploads
  - Incorporate any responsive styling, including breakpoints as needed, where the layout changes with screen size

- SEO Strategy and Implementation
  - Review proposed site design, site architecture and URL structure; provide specific recommendations to improve search engine optimization (SEO)
  - Perform SEO technical audit; make corrections as needed

- Content Migration: Migrate content from old to new site
Website Launch

- Testing
  - Test and validate desktop and mobile layouts to ensure proper styling, formatting and functioning, review media paths and monitor security
  - Conduct accessibility/508 audit, make corrections as needed
  - Post-launch stability monitoring
- Training: Two remote training sessions on CMS for applicable APHL staff
- Site Launch
  - Move site from staging server to a live environment
  - Set up page redirects for up to 40 key original aphl.org webpages

Website Maintenance

- Create maintenance plan for system upgrades, bug fixes, etc.; time of this engagement will depend on APHL’s ability to move the site fully under in-house management.
- Other ad-hoc updates/troubleshooting or trainings, as needed.

Payment Options

APHL will pay the vendor based on progress of the project.

Project Timeline

Targeting site launch by the end of 2025, with a post-launch period of one to two years for ad-hoc updates and troubleshooting. Exact timing will depend on start of contract, the exact scope of work outlined in the contract and the speed/capacity of the vendor, but the following is a tentative timeline:

Dec. 2023 .................. Finalize contract
Jan.–May 2024 .......... Website Needs Assessment stage
May 6-9, 2024 .......... APHL Annual Conference (Not a deliverable date, but potential APHL staff blackout time with limited staff bandwidth in month leading up to conference; could also be an opportunity to access members in person)
May–July 2024 ........ CMS platform selection
July–Dec. 2024 ........ Website Design stage
Jan.–July 2025 ........ Website Build stage
July–Dec. 2025 ........ Website Launch stage

See the RFP Process and Timeline > RFP Schedule section for more proposal-specific dates.
Proposal Requirements

To be eligible for selection, applicants must provide all information below no later than the Proposal Due Date specified in the RFP Schedule section. APHL will not consider any bid that fails to meet these requirements. Up to three finalists will be invited to meet with APHL after RFP submission.

Please provide a written summary of the topics below that does not exceed 20 pages. If you cannot adequately explain your processes within that space, you may include a supplemental appendix with more detailed technical or background information, but please ensure that all essential components are included in the main proposal.

- **Company Overview**
  Provide a general description of:
  - Your organization; include total years relevant experience and experience working with associations and/or non-profits within the last five years.
  - Your team; include projected size of team who would be assigned to the project.
  - Your systems; include what kind of project management system you use, if any, how and how often you will communicate with APHL, and how you ensure continuity if team members leave.
  - Your work; include link(s) to portfolio/examples of past successful website projects.

- **Ability to Complete the Project**
  - Describe how you will complete each stage of the scope of work, including your general processes for planning and implementing the work, and relevant capabilities or expertise.
  - Note for the CMS Selection stage: We are not looking for direct CMS recommendations; please provide only a high-level overview of what CMS platforms you can support and describe how you would help APHL select a platform.
  - How would you handle any change in scope or timeline?
  - Will any work need to be completed by a third-party sub-contractor? If yes, list which tasks and how you will select the sub-contractor(s).
  - Identify any tasks that are either limited in quantity or excluded from your bid.

- **Timeline**
  Provide realistic timeline for each stage of the project, including when you would be able to begin the project and your projected launch of a live site.

- **Cost**
  - Provide a detailed quote for the project, including:
    - Total cost (can be a range)
    - Breakdown of cost by project stage
    - Estimate cost to pursue tasks excluded from this bid
  - Preferred payment schedule
# Evaluation Criteria

Once submission has closed, APHL’s Evaluation Team will use the following criteria to determine which applicant best responded to the requirements in the RFP. APHL will not change or modify evaluation criteria after receipt of offers.

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Proposal Submission Process

APHL is required to solicit proposals from contractors/vendors for goods or services for projects and initiatives that exceed the Simplified Acquisition Threshold, which this project does.

Once authorized by the APHL Legal Department, APHL advertises the RFP by posting it to the APHL Procurement website, keeping it open for at least 30 days. Applicants may modify or withdraw their proposals at any time before the due date. If the RFP requires clarification or modification, APHL will modify the RFP by issuing an addendum and notifying all applicants of the change in writing.

APHL may terminate or modify the RFP process at any time during the response period.

APHL has an appeals process for dissatisfied applicants; issues may include, but are not limited to, source evaluations, RFP protests or disputes. Please click “Appeal Process” on aphl.org/rfp for more information.

Schedule

Nov. 1, 2023 ............ Informational Call with APHL Web Workgroup | Watch a Recording of the Info Session

Nov. 3, 2023 .......... Letter of Intent due to APHL by 5:00 pm ET

Nov. 10, 2023 .......... Last day to submit questions to APHL by 5:00 pm ET
                        (exceptions may be granted at APHL’s sole discretion)

Nov. 28, 2023 .......... Final Proposals due to APHL

Dec. 8, 2023 .......... APHL completes the initial evaluation process and contacts finalists

Dec. 13-15, 2023 ...... Finalist Presentations

Dec. 20, 2023 .......... Final decision made, winner of bid notified

Dec. 23, 2023 .......... APHL publicly announces the names of the selected applicants on its procurement website

Submission Process

Letter of Intent

APHL requests that prospective applicants submit a brief email statement indicating their intent to submit a proposal no later than 5:00 pm ET on November 3, 2023. Send to madeline.rooney@aphl.org with the subject line: “APHL.org RFP Intent: [company/individual name].”

While the letter of intent is not binding and does not enter the review of the RFP, the information it contains allows APHL’s Evaluation Team to plan the contract development and review process.

Final Proposal

APHL must receive a complete proposal by November 28, 2023. It is the applicant’s responsibility to ensure that the proposal is received by APHL by this deadline.

Applicants must submit their proposal package via email to madeline.rooney@aphl.org with the subject line: “APHL.org RFP: [company/individual name].”

APHL will send an email acknowledging the receipt of each application. If you do not receive an acknowledgement within 48 hours, please email the points of contact below to confirm receipt.

Questions

The last day to submit questions was November 10, 2023.

A member of APHL’s Evaluation Team will respond directly to the questions on an individual basis, as questions are received. While APHL will endeavor to answer questions within one business day of receipt, additional time may be needed depending on the query or concern raised.
APHL is unlikely to answer questions received after the stated deadline, unless the query or concern raises a substantial issue that could affect multiple applicants and may be answered without impacting the application submission and review process. Should APHL opt to answer any late questions, APHL will post the question and answer to APHL’s procurement website and will not respond directly to the sender.

Please see the Applicant Questions section to view questions that have already been submitted.

Contacts

Primary Contact: Madeline Rooney
Email: madeline.rooney@aphl.org
Phone: 240.485.2768

Project Approver: David Fouse
Email: david.fouse@aphl.org
Phone: 240.485.3848
Applicant Questions
Last Updated: November 17, 2023

APHL is no longer receiving general questions.

Info Session
View a recording of the November 1 info session. This session addressed the questions received up to that point, but new questions will continue to be added to this document as they arrive.

Vendor Information

What type of vendor are you looking for to partner with? Do they need to be local? Be industry-specific? What does your "dream" vendor look like?

We are a remote team, though all US-based, so our vendor does not need to be local to our offices in Maryland. International vendors will be considered, though there may be some restrictions for them on accessing APHL members’ personal identifiable information (this seems easily avoidable, though).

Beyond the skills required to complete the scope of work, our ideal partner has:

- Association experience (or at least non-profit experience)
- Dependable mechanisms for project management, communications and continuity.

Is your current provider submitting as part of this RFP? If not, why are you moving away from the current provider?
All interested parties are welcome to submit a response.

Project Operations

Work Group

How many stakeholders will there be from the client-side?

- Core Web Workgroup: Three people (includes project lead), will be your main points of contact and make the majority of decisions.
- Advisory Group: Two to four additional people, will be kept abreast of the project and will be part of major decisions.
- CEO/COO/Board of Directors: Will be consulted at key points in the process to get high-level sign-off on direction and design concept, but will probably not be involved in general operational decisions.

We will also recruit a wider group of staff and member “power users” to help provide user feedback and insight. They will be utilized most during the needs assessment, but we would also like to utilize them for at least one focus group “test drive” during the design phase to get outside perspectives.

Who will make final design decisions?
We will do our best to filter our answers/decisions into a singular voice, but we will want to have multiple perspectives taken into account to ensure we are not missing things and get buy-in from key individuals.

Budget and Scope

What is your estimated budget for this project?
We ask that you provide an estimate for what the project will cost based on the scope of work and our requirements. To that end, please feel free to provide cost scenarios/ranges (see the CMS question, below), or indicate what the baseline cost of something would be and itemize potential add-ons—whatever makes sense for how your organization usually conducts business.
Are you open to a multi-phased project to better clarify scope and budget for later stages?

Given the desire to base design and development on initial needs assessment, we understand it will be difficult to project an exact budget or scope of work for the later stages. We are open to a three-phased approach of:

1) Discovery and Design (Scope of Work Stages 1-3)
2) Build and Launch (Stages 4-5)
3) Maintenance (Stage 6)

The exact scope of work and budget for Phases 2 and 3 can be clarified and codified during the later stages of the previous Phase, but it’s important for us to have a general sense of costs so we can compare. To the best of your ability, please provide a baseline/estimated budget range for the later stages.

How should we present pricing for items that are dependent on unknown factors (such as the cost to implement a CMS)?

Providing a cost range is perfectly acceptable, especially if you indicate why a range is needed.

Two years is an extended period of time for a project of this scope — can you share some insights on what informed your high-level timeline?

If it doesn’t need to take two years that’s great, but we gave ourselves a generous timeline rather than to impose artificial deadlines that cause us to rush and miss opportunities to get it right. We are also keenly aware that our workgroup has full-time jobs on top of this project and we may need to build in buffer time for reviews.

**Research Stage**

What types of data already exist about the website?

- **Site Analytics:** We use Google Analytics and we would be happy to provide access to any other de-identified data that we have. APHL can provide offline reports per request, if there is an additional indicator you’re interested in. However, direct access to our Google Analytics will only be granted to the selected vendor. High-level site traffic data can be found in Background > About the Current Website.

- **Member Surveys:** We have past communications surveys from 2021 and 2022 on how members generally engage with APHL’s products/platforms (including the website). We will provide these and any other relevant data to our selected vendor during the needs assessment.

Will you need a content audit?

Yes, a content audit is expected to be part of the needs assessment scope.

Can we conduct user research with the target audience to provide a user-centric evidence-based approach to the website design and UX strategy?

Absolutely, we are hoping for that to be a big component of the Website Needs Assessment stage. We expect the vendor to work with our community directly so things do not get lost in translation, but we are more than happy to help solicit participants and to facilitate those exchanges.

Is the APHL Web Workgroup representative of your target audience? Are you open to including additional people representative of your audience for user research? If so, would APHL be able to assist in recruiting participants? Or at least provide contact information?

The Web Workgroup is not representative of our audience; we will help recruit a wider group of staff and member “power users” to give a more realistic user perspective.
Website Content

Content Audit and Migration

Is there a need for a content audit to identify outdated or irrelevant content?
A content audit is expected to be part of the needs assessment stage; we hope that this will highlight outdated content and help us decide how to organize the site. After we have a plan for site organization, we will work with our program staff to update content as needed.

Is the vendor responsible for content migration? Will they be responsible for manual content migration where automated migration is not possible?
Yes, the vendor will be responsible for content migration.

How much content will need to be migrated? How much of the current content is to be rewritten? New content created from scratch?
Part of the scope of work in the needs assessment is to audit existing content and recommend changes to optimize our site structure. Based on recommendations some content might need to be merged/edited/archived; migration volume will depend on how much content stays roughly the same.

Regarding copyediting/writing, it is difficult to determine this before the needs assessment and evaluation on layout, audience needs, etc., but we will likely not require copyediting services beyond general suggestions for framing content.

Content Creation and Format

What is the current editorial workflow for content approval and publishing?

- **Copy Writing**: Page editor (usually programmatic staff) makes their content changes. Can check page in prior to publishing for other parties to view/edit further.

- **Submit for Approval**: When changes are complete, page is submitted for approval. In the comments section of the approval request, staff input the section in the page where changes were made.

- **Review**: Web Approvers receive a parallel notification to approve a page for publishing. Approver reviews the changes and looks for errors in spelling/grammar, hyperlinks, formatting, etc. Based on the review, the approver can approve, deny or return the page, or make the necessary edits and then approve.

  There is always a designated staff member who is the primary webpage approver; the others primarily only approve pages they are publishing themselves.

How large is your content authoring, editorial and management team?

- **ITS**: At least two dedicated staff support website administration.

- **MarCom**: Two main website content admin. Have permissions similar to ITS (full-site access) but (One oversees high-level organization/content strategy, one is primary page approver and reviews content/formatting). Several others have ability to approve pages, and do so on an ad-hoc basis.

- **Content Editors**: Most programmatic staff (~70 people) have content editing-level permissions. Programs are responsible for the upkeep of their program sites, and they do this in different ways (smaller teams often have one main content developer, larger teams usually have individual team members manage their own topical areas). All content edits are approved by MarCom or ITS prior to being published for public access.

Are the content governance challenges (consistency, currency, prioritization) you face from a technology, process or team capacity related?
Mostly process and capacity – the responsibility of content updates falls on our subject matter experts (program staff), so if they’re not prioritizing the website it doesn’t get tended to. And MarCom does not currently have the capacity or content-awareness to take that responsibility on.
What role do you anticipate the vendor playing in aspects of the content process such as content modelling and specifications, planning, establishing updated content style guidelines, etc.?
A deliverable for the Needs Assessment is “Options to address or improve major weaknesses/challenges in new website.” Based on results from the needs assessment, we hope that the vendor can provide suggestions or guidance on best practices or strategies we can adopt for areas where there are gaps.

What format do you utilize for presenting research and other findings/reports?
Primarily PDFs, secondary pages, some PowerBi dashboards.

Aside from SharePoint and the AMS, what systems provide content to the web site?
We have a blog webpart that pulls stories in from that site, an embedded feed from CDC (Food Safety landing page), embed PowerBi dashboards (example on Career Pathways landing page) and videos from vimeo.

What digital channels besides the web are key to your online communications and audience engagement?
Emails (our members really like email!), Lab Matters magazine (published online and hardcopies mailed to laboratory directors), blog, podcast, social media, annual report (published online), technical publications (digital version hosted on website).

Is omnichannel content management and publishing a key future-forward need, or are your content management needs more focused on the web channel?
Currently focused on web channel but that would be an interesting question to look into during the needs assessment.

Documents
Will this scope of work include assuring that all PDF content on the site is 508 compliant or does it apply only to web content (html)?
No, just web content.

What is the current volume of documents on the site? Are these documents permanently stored in the website or are they discarded after some time?
Approximately 10,000 documents are currently on the site (this does not count pages). Documents are permanently stored on the website unless specified by content owners.

Will existing PDFs need to be updated/migrated into a different format?
No, it’s unlikely that we would need/want to convert old PDFs. We are open to finding new presentation options for documents for the future though!
CMS Selection

Is there a budget range you would like to stay within for CMS licensing fees for proprietary CMS options?

We will take this type of fee into consideration during the selection process.

Is APHL looking for direct CMS recommendations in this proposal?

No, we are not looking for direct recommendations during this RFP process, as we want to base our decision off the initial research stage to ensure we’re meeting our true needs. See Scope of Work > CMS Selection (page 7).

Why is APHL leaning against an open-source CMS? Are you open to hearing an argument for an open-source CMS platform like WordPress? What would it take to convince your team that this is a good fit for your needs?

We are open to hearing arguments for open-source CMS platforms, as long as those are not the only options presented.

We’d want to know how vibrant the open-source community is in terms of ongoing support and upgrades, and what impact those upgrades would have on the site, on costs, etc.

Our main concerns are with the long-term maintenance of open-source CMSs. With some previous open-source projects, we found that without in-house expertise, the low initial cost of ownership for open-source ends up being offset by higher consulting costs as updates are needed to accommodate third-party changes. If we need to hire an in-house developer, it may be difficult to hire staff with the skills/experience to maintain our open-source tools, depending on the CMS platform.

Is there any organizational predisposition to a specific CMS platform or technology stack, i.e. .NET or PHP? Do you have a preference for a CMS tailored specifically for associations off the shelf?

We do not have a specific CMS platform in mind, and we are not limiting programming languages to just .NET.

Can you share more details around your expectations to multiple CMS platforms? Do you anticipate your finalist vendors to have expertise in the CMS platforms?

The RFP asks for between two to five options, with the expectation that the vendor will be able to present at least two CMS options so we can compare pros and cons, rather than steer us towards one platform from the beginning.

What will you be looking for when evaluating a CMS?

APHL will perform a comparative evaluation of the CMS platforms proposed by the vendor and our current CMS platform. APHL will evaluate if certain features on our current CMS are available on the new proposed CMS platforms and what additional features are available. Some examples of comparative evaluation:

- Enhanced back-end user experience
- More flexibility to customize page layouts in conjunction with custom webparts
- Security roles - permission-based access
- Provide back up solutions for entire site as well version history
- Provide staging and production environments
- Approval workflows
- Form builders and data table management
- Ability to sync user database with AMS
- Front end permission-based access to website content based on AMS profile tags

What are the priorities of your Web Workgroup when it comes to evaluating a CMS? For example: backend user experience vs flexibility vs security etc.

As mentioned earlier, APHL will perform a comparative evaluation between proposed CMS platforms and the one we currently have.
Website Design/Build

Site Features and Capabilities

Are there any features of the current website that you’d like to preserve?
This will ultimately depend on findings from the needs assessment, as that will tell us more clearly what users want to keep or need to change.

What new capabilities would you like the new site to have? Are there new feature requirements that you anticipate will require new third-party tooling/additional custom and/or API-based integrations?
The main pain points we would like to address are the lack of page template flexibility, mobile friendly site, easy interface for admins to maintain the site. New features and/or API connections can involve but not limited to:

- SSO and profile sync with MC Trade
- Possible social media integration
- Ads management
- Ability to embed PowerBi Dashboards (iframe HTML code)

Can you provide examples of the custom-coded features you’ve needed to build out?

- **Homepage featured items** (see image right) are a webpart that pulls from an article page template. Turns out, we wanted to feature things that weren’t just articles, so that format ended up not being helpful for everything we want to promote there. To feature different types of pages/resources, we have to build a redirect to the intended destination via an article page to get it to sync.

- **Collapsible content** (Example on APHL 2024 page), pulls from backend lists and frontend is custom coded, we would like for this to be an OTB webpart without the need for custom code to build and easy for users to edit content.

- **Library searches and filters** (publications, training) – pulls from backend list, search capability and frontend list is all custom coded.

- **Sidebars** – utilize code for a single-celled table to change background color (example: APHL Profile).

Can you provide examples of interactive/dynamic graphics you are looking to add to the website?
There are surely others that would simply be fun or engaging to have, but the following would be examples of functional improvements:

- **Maps**: We use maps a lot and it’s often helpful to be able to interact with the map to learn more about what is happening at each location. Right now, they are either static or have to be custom coded. Examples:
  - Membership
  - Regional Consortia
  - Countries We Serve

- **Documents/ Infographics/Dashboards**: We built out our Annual Report as a website (external to aphl.org) and a simplified version of this could be a nice option for some of our publications, such as infographics or top-lines of survey data.

Will the site need a translate language feature?
This is a “very nice to have” feature, as we do a lot of international work, but it’s not a “must have” item.

Does the site need to host classes? Or will that feature remain only with the 3rd party site?
That feature will remain on the 3rd party site.

Is membership management in scope?
No. However, membership data is to be integrated via SSO to manage access to sections of the website.
How vital is it to migrate the external sites noted for possible migration/consolidation?
We are interested in what it would require to bring in the Annual Report and the blog sites, but it’s not an essential requirement; both sites are functioning well as they are so the new site would probably need to offer something that is missing – but the option would be nice to have.

What responsibilities will the vendor have regarding advertisements?
Selected vendor needs to make sure the site can be configured to allow ads, but is not responsible for content. Ads will likely be static images or GIFs that would link to other pages, sites or materials; exact nature of file/code will depend on capabilities of CMS. We don’t currently have an advertising platform, but would be interested in exploring what the options are for this.

Site Integration/Migration

What social media integrations are you hoping for?
We have Facebook, Twitter, Instagram, TikTok, LinkedIn, YouTube and Vimeo; not all will need to be integrated but we would like the option for at least one or two to be integrated. We’re not entirely sure what “integration” will look like (just “share” options, pulling in feeds, something we haven’t thought of yet?) and that would be helpful to explore in the needs assessment or based on your past experience.

Our blog currently has “share” and “follow us” icons, so these would be a minimum level of integration needed for a new blog platform. We would also like to explore additional options, such as social feeds.

What business platforms/tools (CRM) that you currently use will require integration? Is there an expectation to integrate 3rd-party user data that is not a part of AMS/SSO?

- AMS: Certain sections in our website are meant for member-only access and our AMS is the system that dictates when a profile is tagged as a member or not.

- LMS: While all events/classes will be hosted on the external site, it would be very helpful to have the ability to promote LMS events on the main website – pulling a name/date/link like we currently have on the homepage (they are currently pulled from a manually updated list).

- Blog: if it’s not migrated, we would want to retain the ability to query the site to pull in blog stories

See page 14, Appendix > APHL’s External Websites and Microsites for a full list of sites and their integration needs.
Can you more fully explain the need for AMS integration and single sign-on?

The new platform needs to be able to handle SSO with third party platforms (in our case MC Trade) and allow us to specify content access based on features of a visitor’s MC Trade profile. With our varying audiences, we have some materials that are sensitive and cannot be publicly available.

The password-protected content is not separate from the main site and is included in this scope of work. We have several pages/libraries (My APHL, the Member Resource Center) that are integrated with MC Trade so that access is restricted based tags in a user’s profile. This functionality requires the website - via SSO with our AMS - to read membership data in our AMS and identify if the logged-in profile has the member tag in our AMS; if yes: allow access to the site, if not: deny access to the site.

Examples:

- **Member Resource Center**: This is a searchable document library; submitters upload a document and add a couple fields of metadata. We have built a custom-coded front-end list that pulls the document’s data and allows for search function. It looks and functions exactly like the [Publications Library](#), except it has access restricted to those with a member designation on their MC Trade profile.

- **My APHL**: This is a single page integrated with MC Trade to allow those who are signed into the website to easily access their member account, CoILABorate communities, etc. – the bulk of the other content is static-generic resources.

How these “hidden” features function in the future will be part of the needs assessment and design process; however, the capability to integrate the AMS data will be necessary for the new platform, regardless of the exact organization of the content.

**My APHL**:

![My APHL](image_url)

**MRC submission page**:

![MRC submission page](image_url)
Site Design

Will the new site need to adhere to APHL’s existing brand guidelines? What level of flexibility is there for meeting accessibility requirements?
We are not looking for an overall rebrand, just a fresh look that fits inside our existing brand ecosystem. Adjustments can be made to meet contrast requirements or other accessibility requirements, though.

Does the brand framework include digital guidelines and assets? Have the online guidelines been vetted for accessibility?
Yes, brand includes digital guidelines but they have not been vetted for accessibility.

To address accessibility/Section 508, does APHL want to aim for WCAG Level A or Level AA? Are there specific requirements to take into account?
We would like to aim for WCAG AA. We are open to suggestions on which target we choose based on your expertise and the results of the needs assessment. There are no external requirements we’re aware of.

What areas of SEO strategy are you looking for guidance on from the vendor (e.g., content strategy, acquisition or inbound SEO, organic search, etc.)?
We are hoping for broad, holistic suggestions on SEO strategy based off the content audit and needs assessment.

What are you looking for when you ask for “several rounds of revisions”?
If you have a standard limit on revisions please indicate that. We didn’t want to accidentally limit our revisions by stating a number lower than a vendor can offer.

The RFP asks for “up to three high-level site maps for new site.” Does this mean 3 different options or 3 rounds of revision?
Options – this is just in case we have several ideas of how to organize the site. When we say high-level we mean sub-site landing page-level only—just enough to get an idea of how things will be grouped but not particularly detailed.

Site Development and Launch

What is your current DevOps setup? Will the vendor build out the new solution within APHL’s existing DevOps infrastructure or set up a new DevOps pipeline?
We have a dev environment with minimal server resources. The DevOps team is small, one front-end developer, data architect and automation specialist and one infrastructure engineer. It is hosted in Azure Cloud.

Depending on the level of customization and maintenance required, the APHL team may be open to the new agency helping set up a new DevOps pipeline.

Are there policy and/or technical considerations that may restrict consideration of cloud and/or SaaS-based solutions?
Our security and back-up policies would be the only concern on cloud and SaaS solutions.

Are there specific Service Level requirements around uptime and resolution response times?
- System down/critical/urgent: immediate - two hours, 24/7
- High: Four business hours response time
- Medium: Six to eight business hours response
- Low: 24 business hours response time

Please clarify the requirements for “Cookie Management and custom acknowledgment messages.”
We want to notify people going to our site that we use cookies, give the person the ability to accept/decline or perhaps even select the cookies they want being used while they are on the site—similar to the APHL Learning Center, with a banner at the bottom for you to accept or select your preferences.
Can you clarify how or why the site will need to “integrate with APHL’s data collection systems”?
Our current platform allows for the creation of “lists” which are tables of data that can be edited by users and said data can then be presented in different ways. Some tables have different column types such dropdowns, text areas, etc.

If the new CMS does not provide a way to have data tables, we would like to explore an integration to MS forms or Qualtrics where data submitted to these platforms can be queried and presented to the user in different layouts.

We would also like the ability to embed iframe HTML code to embed PowerBi dashboards and other custom visualizations.

**Site Management**

**Administration**

**How many roles and permission groups does the current website have?**
- **Platform Administration Roles:** Approvers, Designers, Developers, Full Admin
- **Content Administration Permissions Levels:** Full Control, Contribute, Contribute-No Delete, Read
  Permission groups are assigned one of the above permission levels, and can be added to parent landing sites and/or more granular access to subsites or specific pages.
- **Content Access Permissions:** See the “AMS Integration” question in the Website Design/Build > Integration/Migration section for more info on account-level access.

**What are the skillsets of your web admin team?**
- Front-end developer with HTML, JS, JQuery and CSS experience.
- .NET developer to build custom components.
- Copy editing and editorial, graphic design

**What do you do in-house for digital strategy, UX/UI design, development, content strategy, analytics and marketing?**
- Digital and content strategy, marketing: all in-house, but limited in scope.
- UX/UI design and development: in-house developer to customize existing templates and webparts
- Analytics: google Analytics

**How many web administrators does the APHL expect to have at launch?**
We would like five administrators (staff with the ability to manage all aspects of the website) plus the ability to create and assign additional roles as needed to other staff to manage content, approvals, etc.

**Will APHL ultimately be looking to bring the ongoing management and evolution of the platform in-house, or will you require an ongoing partnership? And in what capacity?**
Our preference is to have in-house support but open to other suggestions and what makes more sense, budget-wise.

**Metrics**

**What business metrics or processes does the website currently impact?**
The website is a platform for membership acquisition and retention; conference and meeting registration, sponsorship and exhibits; recruitment and support for career pathways participants; emergency response information and resources; and is an essential component for supporting requirements of our funding and our strategic plan.

**What are the key performance indicators (KPIs) that APHL would like to track post-launch?**
Pageviews, time spent on a page, bounce rate (others TBD per vendor suggestion).
Evaluation Criteria

“Size of team” is an evaluation factor – does APHL prefer a smaller team, for more efficient communications, or a larger team, for useful redundancies?

A larger team (6-8 people) is preferred for “useful redundancies.” We have run into high turnover during long projects like this and that is easier to weather with some institutional knowledge. Also, a slightly larger team says to us that more aspects of the job will be done in-house.

“CMS Options” is an evaluation factor (50/855) – can you explain how you will evaluate this, as the contractor is tasked with presenting up to five CMS options as part of the contract?

We are evaluating how many CMS platforms your organization regularly works with, that you could implement with expert-level understanding. Since we don’t yet know what CMS platform we’d like to use, this gives us an indication of who might be able to provide us with the widest range of options, and not steer us towards the one or two they are most comfortable with.
Appendix

APHL’s External Websites and Microsites

- **APHL Submission Portal** (via RQ Awards)
  - Purpose: Hosts applications for fellowships, internships, award nominations, etc.
  - Access: Single Sign-on with MC Trade

- **ColLABorate Online Communities**
  - Purpose: Online communities of practice, message boards, etc.
  - Access: Single Sign-on with MC Trade

- **Annual Report**
  - Purpose: Microsite hosting an interactive report, updated on a yearly basis and built by an outside designer
  - Access: No sign-in required to access content
  - Considering migration to aphl.org

- **APHL Blog** (via WordPress)
  - Purpose: Publish stories and other content. Stories are also featured on aphl.org via query webparts
  - Access: No sign-in required to access content
  - Considering migration to aphl.org

- **Career Center**
  - Purpose: External job postings from members or partners
  - Access: No sign-in required to access job postings; independent sign-in required to post jobs or resumes

- **APHL Jobs** (via iCIMS)
  - Purpose: Internal job postings, interviewing and onboarding processes
  - Access: No sign-in required to access job postings; independent sign-in required to post jobs or resumes
  - Open to integration or migration to aphl.org

- **APHL Learning Center**
  - Purpose: Host on-demand trainings (webinars, interactive courses, etc.), track individual’s progress on courses, credits, etc.
  - Access: Single Sign-on with MC Trade

- **NewSTEPs**
  - Purpose: The Newborn Screening Technical assistance and Evaluation Program (NewSTEPs) is an APHL program that supports state newborn screening programs; the website is a resource center that hosts a large data repository and generates data visualizations.
  - Access: No sign-in required to access main site; independent sign-in required to access state-specific data or other specific visualizations, or to update a state’s profile information

- **Datapult**
  - Purpose: Datapult is a wholly owned subsidiary and LLC of APHL and is a 501(c)(3) company.
  - Access: No sign-in required
**APHL Branding Guidelines**

*Note:* The following guidelines are just for informational purposes and do not need to be incorporated into the submitted proposal.

APHL has established branding and graphic standards to create a visual identity for the association. By assuring consistent standards, we raise APHL’s visibility among target audiences, as our customers come to associate our “look” with our commitment to strengthening public health laboratory science and practice. The standards also reinforce those qualities that make APHL unique: **leading-edge science, innovative programs, quality service and high standards of excellence.** Like a flag, the standards identify our products while representing our collective achievements, values and aspirations.

**APHL Colors**
APHL has two primary colors: **TEAL** and **RUST.**

### Primary Colors

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<th>Colors</th>
<th>RGB</th>
<th>CMYK</th>
<th>Hex Code</th>
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<tbody>
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<td>#009999</td>
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<td>C 0, M 90, Y 72, K 29</td>
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<tr>
<td>Black</td>
<td>R 0, G 0, B 0</td>
<td>C 0, M 0, Y0, K 100</td>
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</tr>
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</table>

### Secondary Colors
Secondary colors should be used sparingly but are helpful in presentations or graphics where a variety of colors may be needed (e.g., icons, charts).

#### Primary Color Gradients

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#### Secondary Colors

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<tr>
<td>Purple</td>
<td>R 153, G 96, B 167</td>
<td>C 44, M 73, Y0, K 0</td>
<td>#9960A7</td>
</tr>
</tbody>
</table>
**APHL Logos**

The APHL logo is the foundation of the association’s identity, and the most visible component of our organization’s brand. The following guidelines outline the correct and consistent use of the association’s logo.

<table>
<thead>
<tr>
<th>Logo Type</th>
<th>Logo</th>
<th>Use</th>
</tr>
</thead>
</table>
| Full logo (long), Teal and Rust | ![Logo](image) | **Preferred option**  
For use on white or very light solid colors.  
Use any file type on white; PNG or EPS only over colors. |
| Full logo (long), Black     | ![Logo](image) | Use on light color(s).  
Use only as PNG or EPS to retain transparent background. |
| Full logo (long), White     | ![Logo](image) | Use on dark color(s).  
Use only as PNG or EPS to retain transparent background. |
| Short logo (acronym)        | ![Logo](image) | Use in conjunction with a long logo or on its own if space is an issue. Color options:  
- **Teal**: Preferred option; use on white or light solid colors.  
  Use any file type on white; PNG or EPS only over colors.  
- **Black**: Use on light color(s); PNG or EPS only.  
- **White**: Use on dark color(s); PNG or EPS only. |

**APHL Official Fonts**

**Helvetica Neue Family: Headers, Callouts**
The Helvetica Neue typestyle was selected for titles, headers and extra “callout” information because of its crispness, simplicity and versatility. There are a variety of weights to suit your needs. The kerning for the type should be between -3 and -10.

**Franklin Gothic Family: Body Text**
The Franklin Gothic typestyle was selected to be used for body copy because of its readability. The kerning for the type should be a consistent -3.

**Alternative Fonts**
Alternative to Helvetica for title/head font: Franklin Gothic Demi or Franklin Gothic Medium

Alternative to Franklin Gothic for body font: Arial