Request for Proposals (RFP):
Learning Management System Implementation for the Association of Public Health Laboratories, Inc.

February 16, 2022

Submissions due to: Jasmine Abston (Jasmine.Abston@aphl.org)
via: The Association of Public Health Laboratories, Inc.
8515 Georgia Avenue, Suite 700
Silver Spring, MD 20910

This project is supported by Cooperative Agreement Number NU60OE000104 between the Centers for Disease Control and Prevention (CDC) and the Association of Public Health Laboratories, Inc. The contents of this RFP are solely the responsibility of the authors and neither represent the official views of CDC nor reflect CDC’s endorsement of a product or procedure.

APHL and Association of Public Health Laboratories are the registered trademarks of the Association of Public Health Laboratories, Inc. and may not be used without prior written authorization.
# Table of Contents

Summary ....................................................................................................................................................... 2  
Background .................................................................................................................................................... 3  
RFP Process Overview ................................................................................................................................... 3  
Eligibility ........................................................................................................................................................ 4  
Anticipated RFP Schedule .............................................................................................................................. 4  
Response Submittal ........................................................................................................................................ 5  
Confirmation of Intent to Respond .................................................................................................................. 5  
Final Response .............................................................................................................................................. 5  
Questions ...................................................................................................................................................... 6  
Scope and Approach ................................................................................................................................ 6  
Project Term and Award ................................................................................................................................ 7  
Proposal Submission .................................................................................................................................... 7  
Guidelines and Required Information ........................................................................................................... 7  
Technical Proposal ........................................................................................................................................ 8  
Cost Proposal ................................................................................................................................................ 8  
Evaluation ...................................................................................................................................................... 9  
Initial Review ................................................................................................................................................. 9  
Evaluation Process ..................................................................................................................................... 10  
Evaluation Team ......................................................................................................................................... 10  
Conflicts of Interest ................................................................................................................................... 10  
Evaluation Criteria ..................................................................................................................................... 10  
Post Evaluation Procedures ......................................................................................................................... 12  
Conditions of Award Acceptance .................................................................................................................. 13  
General Considerations ............................................................................................................................... 13  
Appendix A – Summary of APHL’s LMS Requirements ................................................................................ 14  
Appendix B – Technical Proposal .................................................................................................................. 17  
Appendix C – Cost Proposal Summary .......................................................................................................... 18  
Appendix D – LMS Vendor RFP Scorecard .................................................................................................... 19  
Appendix E - APHL Conflict of Interest Disclosure Statement ...................................................................... 20
Summary

The Association of Public Health Laboratories, Inc. (APHL or the Association) intends to acquire and fully implement a new learning management system (LMS) on or before September 1, 2022. APHL’s LMS will be used to facilitate adult learning through instructor-led training (ILT), virtual instructor-led training (vILT) and hybrid experiences and programs. It will primarily serve as a system to design, develop, deliver and evaluate training programs for public health laboratory science and practice.

APHL’s current systems include:

- LMS: Absorb
  - 76 courses
  - 2,100 users
- Multi-Factor Authentication (MFA) and Single Sign-On (SSO): Microsoft Azure Active Directory (AD)
- Association Management System (AMS): Atlas, MemberClicks (MC) Trade
- Financial Management System: Sage Intacct
- Email: Microsoft Outlook
- Productivity Software: Microsoft 365 subscription product for enterprises
- Survey Tools: Qualtrics and Survey Monkey
- Video Conferencing: Microsoft Teams and Zoom

Due to ongoing development of new programs and widely distributed courses, APHL anticipates approximately 2,300 users, comprised of incoming fellows and interns (primary end-users), and instructors, Association members and affiliates and non-members (secondary end-users) during the first year of LMS implementation; approximately 2,500 users for the second year; and approximately 3,000 users for the third year.

Through this Request for Proposals (RFP), APHL seeks to identify a LMS vendor that can meet the following high-priority system requirements:

- Robust security
- Accessibility/Section 508 compliance standards
- Robust, customized analytics and reporting
- Atlas, MemberClicks (MC) Trade AMS and Sage Intacct integration
• eCommerce integration
• Assigning learning/training pathways based on competencies and curriculum frameworks
• Record user/learner transcripts (including Continuing Education Units or CEUs)
• Administer certificates and re-certifications
• Plug-ins or integrations with virtual conference platforms
• Sharable Content Object Reference Model (SCORM) compliant
• Multilingual support

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 laboratories 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 to prepare for outbreaks and other public health emergencies.

The APHL Training and Workforce Development (TWD) Program currently implements workforce development projects for internal APHL programs and federal public health agencies. APHL’s TWD program is working with individual staff across various programs within the Association to identify a LMS that has the capacity to fulfill the high-priority requirements, amongst other needs described in Appendices A and B.

RFP Process Overview

APHL is required to solicit proposals from vendors for goods or services for projects and initiatives that exceed the Simplified Acquisition Threshold. The procurement and implementation of a LMS is above this threshold. Therefore, the RFP process entails:

1. Once authorized by the APHL Legal Department, APHL advertises the RFP by positing it to the APHL RFP website, https://www.aphl.org/rfp.
2. The RFP posting is required to remain open for a minimum of 30 days. (Note: Applicants may modify or withdraw solicitations before the date and time set for opening the RFP)

3. If the RFP requires clarification or modification, APHL, before the deadline, can modify the RFP by issuing an addendum. APHL will notify all applicants and recipients of the change in writing.

4. Once APHL opens the bids, APHL’s Evaluation Team will determine which applicant best responded to the requirements in the RFP.
   
   a. A written method for evaluation, including significant factors, will be prepared, used and publicized by TWD program staff and designated staff across the Association. (Note: APHL will not change or modify evaluation criteria after receipt of offers)
   
   b. APHL will use this method when issuing the award to the bidder that is most advantageous to APHL’s Programs.
   
   c. APHL will consider any bid that fails to meet material requirements set out in the RFP as nonresponsive

5. APHL has an appeals process for dissatisfied applicants.

   a. Issues include, but are not limited to, source evaluations, RFP protests, disputes and other claims.


**Eligibility**

Interested parties must submit a proposal to APHL that provides all information specified in the Proposal Submission section below. 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. 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 Time (ET) on March 17, 2022. APHL anticipates the following schedule for the entire competitive bidding process:

- **February 16, 2022**
  - APHL issues RFP

- **February 25, 2022**
  - Letter of Intent due to APHL by 5:00 pm ET

- **March 4, 2022**
  - Last day to submit questions to APHL by 5:00 pm ET (exceptions may be granted at APHL’s sole discretion)
March 17, 2022 Complete RFP responses due to APHL by 5:00 pm ET
March 24, 2022 APHL completes the evaluation process and contacts winning/selected applicant
March 28, 2022 APHL publicly announces the names of the selected applicants on its procurement website, www.aphl.org/rfp
March 31, 2022 Anticipated start date of LMS implementation initiative

Response Submittal

Confirmation of Intent to Respond

APHL requests that prospective applicants submit a brief email statement indicating intent to submit a proposal by no later than 5:00 PM ET on February 25, 2022. The letter of intent should be emailed to Jasmine.Abston@aphl.org. 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. Potential applicants must include the name of the company or individual, that will submit the proposal, in their email.

Final Response

APHL must receive a complete proposal by no later than 5:00 PM ET on March 17, 2022. Applicants may send proposals by the following methods:

Via email to Jasmine.Abston@aphl.org; or

Via certified, registered or express mail through the postal service or via trackable mail delivery services provided by DHL, FedEx or UPS, addressed to:

c/o Jasmine Abston
The Association of Public Health Laboratories, Inc.
8515 Georgia Avenue, Suite 700
Silver Spring, MD 20910

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.

Regardless of the delivery method, APHL must receive all responses by 5:00 PM ET. It is the applicant’s responsibility to ensure that the proposal is received by APHL by this deadline.

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

Please direct all questions regarding this RFP or its application requirements via email to Jasmine Abston at Jasmine.Abston@aphl.org, with a copy to Catherine Johnson at Catherine.Johnson@aphl.org.

A member of APHL’s Training and Workforce Development (TWD) Program 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 should receive all questions by 5:00 pm ET on March 4, 2022. APHL is unlikely to answer any question received after this deadline, but it will have discretion to do so if APHL’s TWD staff reasonably feel that 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.

Scope and Approach

The company engaging in this initiative must provide the capabilities to work from the early stages of implementation planning through full implementation of the LMS, including administrator and end-user training.

APHL has included a descriptive list of LMS requirements, concerning accessibility; technical capabilities; security provisions; interface customization; learning trajectories; course, content and user management; vendor support; and analytics and reporting. The selected applicant will work with APHL to ensure a cost-effective, fully implemented LMS and completion of related user training(s). This material may be found in the following RFP attachments:

- Appendix A: Summary of APHL’s LMS Requirements
- Appendix B: Technical Proposal
- Appendix C: Cost Proposal Summary

The selected applicant will be expected to do the following:

1. Create a comprehensive implementation plan and timeline that includes each implementation phase.
   a. Configurations/Customizations
   b. Integrations
   c. Course and Data Migration
d. User Acceptance Testing

e. Rollout

2. Create and implement a training program for users.

   a. Include virtual training sessions for administrative users

   b. Include function and feature-specific and user-specific resource/support materials (e.g.,
      guides, knowledge base, video tutorials)

APHL will work with the selected applicant to establish the implementation plan and timeline.

**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 up to a maximum amount of $100,000 for full
implementation of a LMS.

APHL has responsibility for validating the implementation of all configurations, customizations,
inTEGRATIONS, migration and LMS resource and support materials specified in Appendices A and B.

The LMS should be fully implemented and live by September 1, 2022, with a final invoice received by
APHL not later than December 30, 2022.

**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 listed 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 15 pages of narrative and visuals. If an
application exceeds this 15-page limit, only the first 15 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: The Cost Proposal,
Cost Proposal Summary in Appendix C, Technical Proposal in Appendix B, or anything applicants include
as an appendix will not count as part of the 15-page limit requirement). The completed and submitted
Cost Proposal, Cost Proposal Summary, and Technical Proposals will be reviewed during the evaluation
process. APHL will only use applicants’ appendices as reference material; APHL will not include those
materials in the evaluation process.

The applicant must include the following in their 15-page (or less) response:
1. A company profile/history of the company;

2. A description of two (2) past clients (i.e., global, health or public health, or science non-profit organizations) for which the applicant fully implemented a LMS. Examples (e.g., visuals, website links) of relevant customizations, products and/or services may be included;

3. Reference information from three (3) former or current clients. Include the company name; contact person’s name; contact person’s phone number and/or email address; and a description of product(s) and service(s) rendered;

4. A description of the applicant’s experience in successfully implementing LMS for corporations and/or non-profit organizations (relevant examples of customizations, products and/or services may be included as an appendix);

5. A description of the team that will be assembled for the implementation cycle, including a description of each person’s role (resumes or CVs may be provided as an appendix); and

6. A description of the applicant’s project management and LMS implementation processes.

In addition to responding to the required information above, the applicant must complete the Technical Proposal and Cost Proposal Summary in Appendices B and C, respectively, and a cost proposal with cost estimate explanations/justifications.

**Technical Proposal**

Applicants must complete the Technical Proposal in Appendix B, along with the proposal requirements above. This document contains a comprehensive list of LMS features, functions and user-related capabilities desired by APHL. The applicant should provide solutions (i.e., standard, configurable or customizable) that are commensurate with APHL’s high-priority LMS requirements, or indicate that there is no solution (i.e., not possible or not recommended) for a feature, function or user-related ability. The applicant should include additional comments or justification, when necessary.

**Cost Proposal**

The applicant is required to complete and submit the Cost Proposal Summary in Appendix C, along with the proposal requirements above.

Additionally, the applicant must provide a description of their pricing model; a cost estimate based on both a hosted (hosted by LMS vendor/SaaS) and local (hosted locally by APHL) LMS; and the estimated duration and explanation/justification of the following items in Appendix C – Cost Proposal Summary:

1. LMS annual license cost (Year 1)

2. license scale for registered users/additional users
3. additional plug-ins and integrations cost (i.e., connectivity to Atlas, MemberClicks (MC) Trade AMS)

4. course and data migration cost

5. customizable certificates cost (if applicable)

6. systems and super-user training

7. RSS Feed (if applicable)

8. ongoing maintenance fee

9. technical support fee

10. any additional recurring costs (Year 1)

11. annual maintenance and support cost (Year 2)

12. annual maintenance and support cost (Year 3)

13. any additional costs (Years 2 and 3)

The cost proposal must not exceed five (5) pages. There is no required format; the cost proposal should be submitted in the format of the applicant’s choice.

Note: APHL’s user projections for the first year are 2,300 users; 2,500 users for the second year; and 3,000 users for the third year. APHL has allocated a maximum amount of $100,000 for the implementation of a LMS.

Appendix A: The Summary of APHL’s LMS Requirements has been included to assist applicants in understanding APHL’s desired LMS features. Note: Applicants are not required to use or reference anything outlined in Appendix A, unless they would like to. APHL only provides this as supporting documentation.

**Evaluation**

**Initial Review**

APHL staff members will conduct an initial review of all proposals for completeness. APHL will not consider applications received after the due date specified in the Anticipated RFP Schedule section above. 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. APHL’s Senior Specialist in Instructional Systems Design will coordinate the review process and the evaluation sessions.

The reviewers may request demonstrations with all or some of the applicants. Following these demonstrations, reviewers may request supplemental information based on an applicant’s proposal. These demonstrations 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

An evaluation team will be assembled to evaluate competitive proposals and then, assess their relative qualities based on the Evaluation Criteria outlined below. This evaluation team will consist of six APHL staff.

Conflicts of Interest

APHL will ask potential reviewers to complete and sign APHL’s Conflict of Interest Disclosure Statement 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. APHL will not select reviewers with a perceived or potential conflict of interest. Once potential reviewers have been identified, APHL’s Director of Training and Workforce Development will have final approval of the review team’s composition.

Evaluation Criteria

The evaluation team will use the following criteria to evaluate proposals:

- *Suitability of the Proposal (50%)* – The applicant shows knowledge of implementing LMS for adult learners by communicating and recommending appropriate technical solutions for LMS, as evidenced by the applicant’s completed Appendix B: Technical Proposal and references. The scoring for the Suitability of the Proposal criterion is indicated by numeric scores for each technical specification and feature, function or user-related ability:
  - Zero (0) indicating “not possible”;
  - One (1) indicating “not recommended”;
  - Two (2) indicating “customizable”;


o Three (3) indicating “configurable”; or

o Four (4) indicating “standard”

- **LMS Vendor Capacity (20%)**– Applicant has successfully completed similar initiatives and has the qualifications necessary to undertake this initiative. The applicant has appropriate staff to devote to the initiative within the timeframe needed, as evidenced by the applicant’s description of similar initiatives and implementation team roles. The scoring for the **LMS Vendor Capacity** criterion is indicated by numeric scores:

  o Zero (0) indicating the respondent is completely unqualified; has not completed similar initiatives, and does not have appropriate staff to devote time to the initiative within the timeframe needed;

  o One (1) indicating the respondent is insufficiently qualified; has not completed similar initiatives, but has the appropriate staff to devote time to the initiative within the timeframe needed;

  o Two (2) indicating the respondent is qualified; has completed a few similar initiatives and has the appropriate staff to devote time to the initiative within the timeframe needed;

  o Three (3) indicating the respondent is well-qualified; has completed several similar initiatives and is well-staffed to devote time to the initiative within the timeframe needed; or

  o Four (4) indicating the respondent is highly qualified; has completed many similar initiatives and is well-staffed and can easily identify staff to devote time to the initiative within the timeframe needed

- **Value/Pricing Model and Price Levels (20%)** – The price is commensurate with the value offered by the applicant, as evidenced by the cost estimate and explanation/justification related to configuration, customizations, integrations, course and data migration and user training and support materials. The scoring for the **Value/Pricing Model and Price Levels** criterion is indicated by numeric scores:

  o Zero (0) indicating the respondent’s pricing model or price levels are incongruent with the LMS’s value, or significantly exceeds APHL’s budget;

  o One (1) indicating the respondent’s pricing model or price levels are incongruent with the LMS’s value, and/or or exceeds APHL’s budget;

  o Two (2) indicating the respondent’s pricing model or price levels are congruent with the LMS’s value, and is at the top of APHL’s budget;
Three (3) indicating the respondent’s pricing model or price levels are congruent with the LMS’s value, and is within APHL’s budget; or

Four (4) indicating the respondent’s pricing model or price levels is remarkably congruent with the LMS’s value, and is within APHL’s budget.

- **Project Management (10%)** - The applicant demonstrates experience and resources related to successful LMS implementation for similar clients (i.e., global, health or public health, or science non-profit organizations), as evidenced by project management and LMS implementation processes. The scoring for the Project Management criterion is indicated by numeric scores:

  - Zero (0) indicating the respondent’s proposal does not demonstrate any experience or resources related to successful LMS implementation for similar clients;
  
  - One (1) indicating the respondent’s proposal insufficiently demonstrates experience or resources related to successful LMS implementation for similar clients;
  
  - Two (2) indicating the respondent’s proposal demonstrates experience or resources related to successful LMS implementation, but for dissimilar clients;
  
  - Three (3) indicating the respondent’s proposal demonstrates experience or resources related to successful LMS implementation for similar clients; or
  
  - Four (4) indicating the respondent’s proposal remarkably demonstrates experience or resources related to successful LMS implementation for similar clients.

The raw scores for each evaluation criterion will be weighted, so that the maximum possible raw score points will be converted into a maximum possible weighted score of 100 percentage points. The APHL evaluation team may request a demonstration from applicants with weighted scores of 38 percentage points or greater for the Technical Proposal.

Please see Appendix D for a copy of the scorecard used for the evaluation process.

**Post Evaluation Procedures**

APHL staff will notify the selected LMS vendor within ten (10) business days of completion of the evaluation. Unsuccessful applicants will receive notification of these results by e-mail or by U.S. mail within 30 days of the date that the winning/successful vendor is selected. Note: Once selected, the applicant must be approved by the federal funding agency.

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 details of the policy are listed 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.

**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 – Summary of APHL’s LMS Requirements

Goal
The LMS must have technical capabilities and features conducive to the development, implementation and evaluation of APHL eLearning, hybrid/blended learning and vILT experiences and programs.

LMS Vendor
- High level of experience with a global organization
- High level of experience within the health and public sectors
- 24x7 technical support
- System downtime scheduled on weekends only

Technical
- Cloud-based/SaaS
- Robust security
  - Anti-spam/Anti-virus/firewalls
  - Automatic backup for data storage
  - Data encryption
  - DRM/licensing controls
  - Domain-based user registration
  - IP blocker
  - MFA
  - Mobile security
  - SSL
  - Third-party certificates
- SSO + System and data integration with Atlas (AMS)
- Accepts variety of file formats (e.g., SCORM, Tin Can API, PDFs, Microsoft suite files, iOs Pages, MP3/MP4, M4v, WMV)
- Mac + Windows friendly (accommodate all legacy versions of Windows)
- Web browser interoperability
- Multilanguage support***
  - simultaneous interpretation during live sessions
  - recording live sessions in all/multiple languages
- Additional plug-ins/SaaS integrations
  - Virtual conference/webinar platforms
  - Calendar
- Offline learning capabilities
  - Must be course specific to prevent breach of copyright

Interface
- White-labeling/APHL branding
- Dashboard customization
- RSS Feed
  - Podcasts
  - APHL social medical accounts
Events calendar (e.g., APHL events, course-specific calendar)
- Search bar
  - Keywords/key phrases/filters for learning content/resources
- Customization of course + curriculum layout/catalog (additional pages/categories)
- Responsive design

Cost Considerations
- License or subscription fee
- Per user fee
  - Less preferred for APHL

eCommerce integration
- Billing by identity
  - User’s association with a lab
- Store facility
  - Inventory management/fulfillment
- Group bundling/purchasing

Learning Content
- In-house course builder editor
  - Assessment creation
    - Import assessments/surveys via Survey Monkey + Qualtrics
    - Observation checklist
      - Recognize/accepts completion of hands-on/demo activities to support Bloom’s Taxonomy apply and create levels
  - Multimedia embedding
- Social networking/Collaborative Learning Tools
  - Discussion boards, chat, email, wikis, send/receive messages
  - Virtual Whiteboard or integration with Google Suite/Dropbox
  - User bios/profiles
- Skills Development/Achievement
  - Administer customizable printable course-specific CE certificates, recertifications/scores with export to Atlas
  - Gamified learning pathway/training requirements (e.g., leaderboard, competency tiers)

User Management/Administrator Controls
- Central file manager
  - Repurpose content
- Access to users’ learning history
- Access to instructors’ and administrators’ activity within LMS
- Batch user uploads
  - Import Excel/csv files
- Role based user identities/administrator control
  - Filter by organization/group options
  - Flexible control of registration/course enrollment depending on:
- Course + role (e.g., self-register/enroll, administrator registers/enrolls, instructor registers/enrolls)
- User data/profile
- Assessment results
- Prior course completion
- Learners’ attendance tracking/offline learning tracking
- User impersonation
- Programmatic prerequisites
  - Lock/unlock courses based on users’ learning trajectory/completion of prerequisites
  - Override course lock/unlock
- Course masking
  - Separate courseware for internal (i.e., APHL staff) and external users (i.e., APHL members, PHL employees and other laboratory employees seeking training)
- Course marketing
  - Automatic emails
- Notification management (e.g., enrollment, course reminders, attendance, out of compliance)
  - Customizable
  - Course-specific

**Data Management**
- Automated reporting/analytics
- Data export customization
  - Export to Excel
  - Atlas integration for course evaluations/completions
- Report distribution to Outlook

**Accessibility**
- Section 508 compliant (e.g., automatic captions/transcripts for video files, keyboard navigation)
Appendix B – Technical Proposal

Please complete the APHL RFP LMS spreadsheet. Applicants are required to complete this proposal and submit it with the proposal requirements stated in the Proposal Submission section. For further instruction, refer to the first worksheet tab, “Vendor Instructions”.
Appendix C – Cost Proposal Summary

Please use the same Excel file (above in Appendix B) to complete the tables in the “LMS Cost Proposal Summary” worksheet tab. Completion of this worksheet fulfills part of the cost proposal requirements mentioned in the Proposal Submission section. The Cost Proposal Summary will help APHL understand your pricing model.

For further instruction, refer to the “LMS Cost Proposal Summary” worksheet tab in the APHL RFP LMS Proposal spreadsheet.
# Appendix D – LMS Vendor RFP Scorecard

The following table is a copy of the scorecard that will be used to evaluate RFP responses. Please note that the descriptors for the four-point scoring scale varies based on the evaluation criteria presented in the Evaluation Criteria section of this RFP document.

<table>
<thead>
<tr>
<th>Scoring:</th>
<th>Lowest- 0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>Highest- 4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category</strong></td>
<td><strong>Criteria</strong></td>
<td><strong>Score</strong></td>
<td><strong>Comments</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Suitability of the Proposal (50%)</strong>: Does the applicant’s proposal demonstrate an understanding of APHL’s LMS requirements?</td>
<td>To what degree did the proposal meet the overall objectives of the initiative?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Did the applicant follow instructions (e.g., stay in page count, include required information)?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Did the applicant complete the Technical Proposal requirements? Provide the raw score.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Did the applicant provide references for three former or current clients?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Section Total (weighted percentage points)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>LMS Vendor Capacity (20%)</strong>: Does the applicant's proposal demonstrate sufficient experience in completing LMS implementations?</td>
<td>Did the applicant list and describe two past LMS implementation initiatives that best reflect their work and relevancy to APHL’s LMS needs?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Did the applicant have the appropriate implementation team and roles filled for successful LMS implementation?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Does the applicant have organizational capacity to commit to fully implementing a LMS?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Is the applicant’s existing knowledge and experience in this field as described in the proposal relevant to the initiative? (provided company profile, length of time in business and experience)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Section Total (weighted percentage points)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Value/Pricing Model and Pricing Levels (20%)</strong>: Is pricing commensurate with the value offered by the LMS and vendor?</td>
<td>Is the total estimated cost for a fully implemented LMS within APHL’s budget?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Is there sufficient and reasonable explanation/justification for estimated costs for configuration, customizations, integrations, course and data migration and user training and support materials?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Section Total (weighted percentage points)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Project Management (10%)</strong>: Does the applicant have demonstrated experience in project management and LMS implementation processes?</td>
<td>Does the applicant demonstrate project management experience relevant to LMS implementation of a health, public health and/or global health organization?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Does the applicant have LMS implementation processes in place to successfully implement a LMS within the timeframe?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Section Total (weighted percentage points)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Score</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.

__________________________________________________________________________

__________________________________________________________________________

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).

__________________________________________________________________________

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:** ☐

☑ 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

γ Yes γ 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

Signature: Date:
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 which 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.