GHTASC Global Health eLearning Center (GHeL)

Request for Proposals (RFP) No.	**RFP-50029-24-01**
Issue Date	August 1, 2024
Project Title	GHTASC Global Health eLearning Center (GHeL)
Amendment Date	
Issuing Office and Email Address for Submission of Proposals	EnCompass LLC jtra@encompassworld.com
Instructions for Proposal Submission	Proposals must be submitted via email. The maximum size per email is 20 MB. Offerors must submit two separate files: Technical Volume and Business Volume. See Section 3.17 for instructions
Deadline for Receipt of Questions from Offerors	August 12, 2024; 6:00PM Eastern Time. Questions shall be sent to jtra@encompassworld.com with the subject **RFP-50029-24-01: Questions**
EnCompass Responses to Questions to Offerors	August 19, 2024
Deadline for Receipt of Proposals	August 30, 2024 6:00PM Eastern Time
Point of Contact	Julie Tra, jtra@encompassworld.com To receive direct notification of any RFP amendments or other announcements related to this RFP, potential bidders may register their interest by sending an email to Julie Tra, jtra@encompassworld.com with the subject **RFP-50029-24-01**
Award Type	Time & Materials subcontract
Estimated Date of Award	October, 2024
Period of performance	Ten- to fifteen-month duration

1 INTRODUCTION AND SCOPE OF WORK

Introduction

EnCompass LLC, an implementer of the United States Agency for International Development (USAID)'s Global Health Training, Advisory & Support (GHTASC) project (Credence Management Solutions LLC is Prime Contractor) invites Offerors to submit proposals to supply and deliver technical assistance to design, develop, and implement an updated website for the USAID Global Health eLearning Center. Award and project expectations are provided in the following RFP sections:

- Part I: Introduction and Scope of Work
- Part 2: Prime Award Flowdowns and Special Requirements
- Part 3: Instructions to Offerors
- Part 4: Evaluation and Qualification Criteria
- Part 5: Attachment A: Detailed Scope of Work and Requirements
- Part 6: Attachment B: Past Performance Form
- Part 7: Attachment C: Representations and Certifications
- Part 8: Attachment D: Evidence of Responsibility Certification
- Part 9: Attachment E: EnCompass Subcontractor Questionnaire
- Part 10: Attachment F: Budget Template

1.1 Type of Contract Anticipated

EnCompass anticipates awarding a Time and Materials subcontract, wherein labor rates are inclusive of all associated costs, and materials are purchased without burden. This contract type is subject to change during negotiations.

The winning subcontractor (hereafter 'contractor') will work in a team-based Agile environment. EnCompass will specify high-level requirements to the Agile team. Using typical Scrum-based Agile processes, the EnCompass Product Owner will work together with the team to turn Section 5.2.4, as well as other requirements stated in Attachment A, into user stories to establish acceptance criteria. These acceptance criteria will specify expected functionality for a user story, as well as any non-functional requirements that must be met in the development of the story. The EnCompass Product Owner, supported by subject matter experts, will determine if acceptance criteria have been satisfied.

1.2 Background

In 2005, USAID's Bureau for Global Health developed the Global Health eLearning (GHeL) Center to provide its worldwide mission-based health staff, implementing partners, and the general public with access to:

- Useful and timely continuing education for the world's premier global health professionals
- State-of-the-art technical content on key public health topics
- Practical resources for increasing public health knowledge.

The GHeL Center platform delivers self-paced eLearning courses to over 400,000 active users around the world on limited bandwidth. When available, the content is posted in multiple languages.

The original site was migrated from a custom Cold Fusion-based system to Drupal 7 shortly after Drupal 7's launch. Over the years, custom features have been redesigned and retooled to meet changing user needs and in anticipation of the feature being reimplemented in an updated version of the site.

The Drupal 7.99 site is currently hosted on Acquia's Enterprise/FedRAMP environment, which is a requirement for this website. The PHP version currently in use on the server is 7.4.33; however, the site code is being updated to accommodate a PHP 8.2 upgrade scheduled in October 2024.

1.3 Summary Scope of Work

The objective of this subcontract is to develop a functional, modern web platform for continuing education for USAID's Bureau for Global Health using Drupal. The contractor will develop a new GHeL Center website and migrate existing content, custom data, and users to the new version of the site.

Success will be based on ease of use, end user acceptance and adoption, the implementation of industry best practices, and rapid time to market for all development efforts. To accomplish this, these services shall be provided via agile software development processes that achieve results through continuous capability enhancement, prompt response to emerging needs, demonstrated reliability, and optimized performance with resource utilization minimized.

1.3.1 HIGH-LEVEL TASKS

The following tasks are assumed to apply to each phase of the project. This is not an all-inclusive list.

- Develop a fully responsive and Section 508[1] compliant GHeL Center website using a recent version of Drupal.
- Develop, test, and integrate the applicable code using best practice management strategies.

[1] Section 508 of the Rehabilitation Act describes requirements to ensure covered information communication technology is accessible to and usable by individuals with disabilities.

- Repurpose existing custom functionality and database schema per stated requirements or present an acceptable alternative.
- Ensure all the site and migrated data is functional.
- Provide documentation on all custom modules, their purpose, and the major and minor version of Drupal they support.
- Document areas of concern regarding requirements expectations.
- Provide EnCompass personnel documentation on how to use the site features and functionality.
- Engage EnCompass personnel throughout the design and development phases to ensure feature implementation strategies meet GHTASC expectations.

The offeror may propose additional tasks they deem necessary to achieve the objective.

1.3.2 PHASED APPROACH

EnCompass anticipates the following two-phase approach. Consistent with an Agile methodology, sequencing work assigned to each phase will be refined as the project progresses. Workflows will allow for iterative efforts within each phase at the same time.

Phase 1: Development of Content Migration Process

The GHeL site contains thousands of course pages that must be migrated from their Drupal 7 site to the new Drupal instance of the site. The fields used in the Drupal 7 content types might not match the fields that are used in the new site. Phase 1 is dedicated to finding a solution that offers content input best practices and a process for digital migration between the sites. Site functionality must be considered when selecting input strategy to ensure that custom features integrate appropriately with content types.

Actions: At a minimum, the following actions are anticipated being performed:

- Validate assumptions, requirements, and functionality described in Attachment A ‘Detailed Scope of Work and Requirements,’ considering the following:
    - **Content** - What is the most cost-effective way to migrate the data and still gain best practices for content/media management in the future? How do we best ensure Section 508 compliance with content management?
    - **Configuration** - How can we prevent reinventing the wheel? Which configuration strategies can be reused and still implement best practices? Where can existing modules be used versus creating custom solutions?
    - **Custom code** - Where can we eliminate custom code? How can we utilize existing custom code logic and database schemas as the basis for the new custom features?
    - **Database size** - Given the number of historical records maintained for the hundreds of thousands of users, is there a way to ensure the database size is manageable?
- Configure the Acquia enterprise development environments (additions to the current hosting plan) provided by EnCompass.

- Review requirements and potential configuration strategies to ensure that required functionality, content relationships, and Section 508 compliance can be integrated with the content type strategy.
- Plan and develop content types that meet best practices and can integrate with site functionality requirements being developed as part of Phase 2.
- Prepare content migration mechanism that can digitally migrate content from the Drupal 7 site to the new site content types.
- Test migration mechanisms.
- Execute content migration and initiate any processes required to fine tune the content migration.

Outputs:

- A content type solution that enables a digital migration of content and integrates with site functionality.
- Development Plan documentation updated with the content type plan and migration process.

Phase 2: Site Development

Using an Agile approach, Phase 2 is anticipated to include a series of sprints that research, plan, develop, and test completed requirements. This approach will allow for priorities, requirements, and tradeoffs to be identified, thus ensuring the sprints produce functionality that will align with Phase 1's outcome.

Actions: Attachment A lists requirements for the site and thus implies the actions to be taken. Actions include but are not limited to:

- Draft the theme documentation. During this process, we will ask questions such as: How can we limit the need for a front-end coder when making layout changes or adding objects such as blocks to a page?
- Develop the responsive and Section 508 compliant theme for the site and engage any layout specific modules that will promote a configuration process versus a custom template process.
- Configure the site to meet as many requirements as possible before using custom code.
- Advise and discuss with EnCompass when the functionality relied upon in Drupal 7 contributed modules is not available in the major version of Drupal selected for the new site. Strategize a solution to minimize custom code.
- Develop the required custom processes by referencing exiting code and applying best practices to improve the processes.
- Create testing plans.
- Perform all levels of testing, including UAT.

Outputs:

- New GHeL site developed and content migrated.
- New theme, development, and testing documentation.
- Site administrator user guide.

Decision Gate: Phase 2 is considered complete when:

- The site meets the agreed upon requirements from Attachment A and subsequent decisions documented in the Phases (both front-end and back-end).
- Documentation is finalized:
    - Design plan
    - Development plan
    - Site documentation/ user-guide
    - Site code

See further detail in Part 5, Attachment A Sections 5.1 to 5.3 for Detailed Requirements.

1.4 Summary Site Development Requirements

The requirements for this development effort are divided into two elements: site migration and site enhancements and new features.

Site migration is the most important element of this scope of work. The contractor will develop a Drupal solution and take advantage of new or improved implementation and configuration strategies for managing and displaying content.

Attachment A, Section 5.2 presents the following topics to convey the base requirements for the new site. They reflect how the current GHeL site is configured and coded and the features that need to be available upon the new site launch.

- User Access and Legal Requirements
- Coding Practices
- Features
- Content Types and Purpose
- Personas/Roles/Tasks

Site enhancement and new features are changes to the existing features that take them beyond what they already are, and new features not currently active on the site.

The summary table below lists the core features and functionality of the current site as well as potential enhancements. Attachment A, Section 5.3 and 5.4 further provides a list of potential features and functionality may be added to the site.

To visualize the descriptions offered below and in Attachment A, it is strongly recommended that offerors create free accounts at https://globalhealthlearning.org and, at a minimum, take a full course, a PDF-based mini course, and an audio-based mini course that offers a community feature.

Core Feature	Site Migration	Site Enhancement
eLearning	An asynchronous, page-turner experience with previous/next and menu navigation. Given the availability of improved content fields, new field strategies are considered part of migration.	Private eLearning courses accessed by admin enrollment. Site tutorials
Certificates	The current, customized certificate tracking system will be migrated.	System generated, Section 508 compliant PDF of the certificate.
Programs	A collection of learning experiences: Full and Mini courses. Programs also earn certificates.	None at this time.
Community	An optional asynchronous community feature associated with a course or a program with discussion, resource, and action item nodes.	Private community environments accessed by admin enrollment.
Engagement and User Communication	Email notifications are currently the only active engagement options on the site and include Drupal default messages, user subscriptions, custom warning feature, and contact forms. Email is processed via a MailChimp integration.	The option for users to sign up for a newsletter separately from their profile. Additional email notifications and/or push notifications may also be considered. Social gaming such as Leaderboards
Dashboard	Features currently in use on the existing dashboard will continue.	One or more engagement enhancements could be placed on the dashboard such as links to how-to pages for common user activities.
Navigation / Find Content	Main and secondary menu navigation, Solr search, and in-page filters will be migrated. Search will be reviewed and configured to ensure content is found as expected.	Site enhancements include the addition of an expandable main menu and adding facets to searches and filters.
Tutorials	At a minimum, the current FAQ feature will be migrated.	Role-based tutorials using a tutorial content type and site sub-section.

Marketing	The current homepage, interactive slideshow and stats will be migrated. Includes the announcements feature as well.	None at this time.
Statistics	Reports and exports for selected time periods: ● Number of certificates earned by course and total over a defined period. ● Number of new users and number of users earning certificates. ● Course evaluation exports. ● Google analytics and any legal requirements regarding retained analytics.	Statistics dashboard for easy management access and data export. One set for site admins and one set for course managers, thus ensuring user privacy.
Timely/Topic based pages	Announcement, Conference announcement, and Learner profile highlight are currently available.	A blog/article collection that can be organized using multiple filters such as author, topic, and date.
Multilingual	Site content, when translations are available, is a multilingual site. Efforts have been made to ensure system generated text is translated as well.	None at this time.

EnCompass may authorize specific enhancements either at the start or throughout the subcontract period of performance. See Section 3.16.2 for relevant cost proposal instructions.

1.5 Required Vendor Experience

The contractor must have in-house experience migrating a highly customized, content intensive Drupal 7 site to Drupal 10 or above as well as performing the work described in Attachment A, Scope of Work and Requirements. Offerors must describe their ability to meet these expectations in the past performance section of the technical proposal.

- Review and interpret extensive custom PHP functionality
- Implement configuration best practices and APIs for Drupal's latest major version
- Implement Drupal community best coding practices
- Implement Drupal's semantic versioning approach to development and implementing strategies that help ensure the new GHeL site can remain in sync with major and minor version releases

- Configure and use Acquia’s Enterprise/FedRAMP hosting environment
- Meet Section 508 requirements both for the system generated code and supporting user generated content
- Migrate existing content from a Drupal 7 site to a new Drupal site when content type fields that do not match exactly.
- (*Preferred, not required*) Drupal 7 configuration practices and Drupal 7 APIs

2 PRIME AWARD FLOWDOWNS and SPECIAL REQUIREMENTS

The terms presented below will be included in any agreement issued as a result of successful Offers in response to this RFP. By submitting a proposal in response to this RFP, Offerors acknowledge their review and acceptance of the following requirements.

2.1 Prohibited Technology

Offerors MUST NOT provide any goods and/or services that utilize telecommunications and video surveillance products from the following companies: Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company, or any subsidiary or affiliate thereof, in compliance with FAR 52.204-25.

2.2 Source and Nationality

The authorized geographic code authorizes EnCompass to procure goods and services only from the following countries. A waiver to these requirements may be sought by EnCompass if the Offeror selected is registered in a country outside of Geographic Code 937.

Geographic Code 937: Goods and services from the United States, the cooperating country, and "Developing Countries" other than "Advanced Developing Countries" excluding prohibited countries. A list of the "Developing Countries" as well as "Advanced Developing Countries" can be found at:

https://www.usaid.gov/ads/policy/300/310maa and

https://2012-2017.usaid.gov/sites/default/files/documents/1876/310mab.pdf respectively.

The source and nationality of goods and services must be verified by EnCompass to ensure that procurement of any goods or services from prohibited countries listed by the Office of Foreign

Assets Control (OFAC) as sanctioned countries is not made. OFAC sanctioned countries may be searched within the System for Award Management (SAM) at www.SAM.gov. The current list of countries under comprehensive sanctions include: Cuba, Iran, North Korea, Sudan, and Syria. Goods may not transit through or be assembled in comprehensive sanctioned origin or nationality countries nor can the vendor be owned or controlled by a prohibited country. EnCompass is prohibited from facilitating any transaction by a third party if that transaction would be prohibited if performed by EnCompass.

By submitting a proposal in response to this RFP, Offerors confirm that they are not violating the Source and Nationality requirements of the goods or services being offered and that the goods and services comply with the exclusions for prohibited countries outlined above.

2.3 Security Clause

The subcontractor acknowledges and accepts the security conditions of the regions and zones where the activities will take place. The subcontractor accepts that there will be no compensation in any case where its personnel or assets are affected by the security conditions during any travel to the regions where the activities are being implemented.

2.4 Logistics Support

The subcontractor shall be responsible for furnishing all travel and logistical support in where the work will be performed.

2.5 Executive Order on Terrorism Financing (Feb 2002)

The subcontractor is reminded that U.S. Executive Orders and U.S. law prohibits transactions with, and the provision of resources and support to, individuals and organizations associated with terrorism. It is the responsibility of the contractor/recipient to ensure compliance with these Executive Orders and laws. This provision must be included in all subcontracts/subaward issued under this contract/agreement. Recipients may not engage with, or provide resources or support to, individuals and organizations associated with terrorism. No support or resources may be provided to individuals or entities that appear on the Specially Designated Nationals and Blocked persons List maintained by the US Treasury (online at www.SAM.gov) or the United Nations Security Designation List (online at:

http://www.un.org/sc/committees/1267/aq_sanctions_list.shtml).

This provision must be included in all subcontracts/sub awards issued under this Contract.

2.6 DOSAR 652.243-70 Notices (Aug 1999)

Any notice or request relating to this contract given by either party to the other shall be in writing. Said notice or request shall be mailed or delivered by hand to the other party at the address provided in the schedule of the contract. EnCompass must make all modifications to the contract in writing.

2.7 Subcontracting

Prior written approval by the Encompass Contract Representative is required to engage lower-tier subcontractors. Costs for lower-tier subcontracts that do not have prior written approval in accordance with this Agreement will not be reimbursed. Inclusion of lower-tier subcontractor costs in the Subcontractor budget or proposal does not constitute a request or approval. Note that this restriction does not apply to commercial vendors.

2.8 Termination of Subcontract

Subcontractors shall remain in effect from the date hereof and shall terminate upon the earliest of the following:

a) For Cause: This subcontract may be terminated for cause at any time, in whole or in part, by Encompass upon written notice. If the Subcontractor fails to comply with contract requirements, then the subcontractor will be given 30 days to remedy the non-compliance before termination is considered.

b) For Convenience: This subcontract may be terminated for convenience by written notice, in whole or in part, by EnCompass or if termination is directed by USAID. If this subcontract is terminated, the termination conditions, including the effective date and, in the case of partial termination, the portion to be terminated, will be provided in the notice.

c) Termination Procedures: Upon receipt of, and in accordance with, a termination notice as specified in either paragraph above, Subcontractor will take immediate action to stop work and minimize all expenditures and obligations financed by this subcontract. Subcontractor will also cancel unliquidated obligations whenever possible. Encompass agrees to reimburse Subcontractor for work completed up to the date of termination on behalf of Encompass.

d) Termination Notice: The Prime Contractor will give thirty (30) business days' notice where possible prior to termination date.

2.9 Confidential Information

The Subcontractor agrees, in the performance of this subcontract, to keep the information furnished by EnCompass or its client, or acquired/developed by the Subcontractor in performance of the subcontract and designated by EnCompass and its client, in the strictest confidence. The Subcontractor also agrees not to publish or otherwise divulge such information, in whole or in part, in any manner or form, nor to authorize or permit others to do so, taking such reasonable measures as are necessary to restrict access to such information while in the Subcontractor's possession, to those employees needing such information to perform the work described herein, i.e., on a “need-to-know” basis. The Subcontractor agrees to immediately notify the EnCompass Contracts Representative in writing in the event that the Subcontractor determines or has reason to suspect a breach of this requirement has occurred.

All Subcontractor staff working on any of the described tasks may, at the request of EnCompass on behalf of its client, be required to sign formal non-disclosure and/or conflict of interest agreements to guarantee the protection and integrity of information and documents of the EnCompass Client. The Contractor (EnCompass) shall insert the substance of this special contract requirement, including this paragraph (c), in all subcontracts when requiring a restriction on the release of information developed or obtained in connection with performance of the contract.

2.10 General Terms and Conditions

Notices. The individuals identified on the cover page of this Agreement are authorized by each party to receive notices.

- Relationship. For the purpose of the subcontract, Encompass will be the Prime Contractor to the party identified in this Subcontract Agreement. Nothing in this Agreement shall be construed to create a joint venture or partnership between the parties, and nothing in this Agreement shall be deemed to create an agency relationship between the Parties or authorize a Party to commit or bind the other Party in any way whatsoever.
- Prime Contractor Client. This agreement is issued under a prime contract with Encompass LLC and shall not be construed in any way to create a contractual relationship between the Subcontractor and USAID. The Subcontractor shall not appeal directly to USAID without the written consent/ concurrence of the Encompass Contract Representative.
- Consideration. The rights and obligations of the parties to this subcontract shall be subject to and governed by this subcontract. All applicable clauses under this award shall be supported by the Subcontractor's certified Representations and Certifications.
- Entire Agreement. This Agreement constitutes the entire agreement between the Parties hereto concerning the subject matter hereof and supersedes any prior or contemporaneous agreements and understandings concerning the subject matter hereof.
- No Assignment. Neither Party may assign or transfer or attempt to assign or transfer this Agreement to any person or entity without the prior written consent of the other Party.

2.11 Ownership

All reports, presentations and other work products related hereto produced by a subcontractor will be considered data, subject to the provisions of far 52.227-14, "Rights in Data - General, Alternate IV." Encompass, on behalf of its funder USAID, shall have the irrevocable, fully paid up right to use, release to others, reproduce, distribute, and publish such data.

2.12 Stop Work Order

Encompass may issue a written notice to stop all or any part of the work called for by a subcontract. Upon receipt of the notice, the subcontractor will stop all work and take all reasonable steps to minimize incurring allocable costs. Encompass shall either cancel the work order by written notice, or terminate the subcontract in accordance with the Termination clause of this agreement. Performance of work by the Subcontractor shall resume upon cancellation or expiration of any stop work order.

2.13 Combating Trafficking in Persons

Under this Federally-funded agreement, trafficking in persons is prohibited, including any trafficking-related activities. The provisions set forth in FAR 52.222-50, Combating Trafficking in Persons are applicable to the Subcontractor, as well as FAR 52.222-56, Certification Regarding Trafficking in Persons Compliance Plan. Information regarding trafficking in persons is found at the U.S. Department of State's Office to Monitor and Combat Trafficking in Persons website:

http://www.state.gov/j/tip/.

2.14 Standard of Conduct

The Subcontractor must be responsible for maintaining satisfactory standards of employee competency, conduct appearance and integrity, and must be responsible for taking such disciplinary action with respect to employees as may be necessary while implementing work. The Subcontractor is also responsible for ensuring that his/her employees do not use Government resources except as authorized by the Government.

2.15 Prohibition of Assistance to Drug Traffickers

USAID reserves the right to terminate the Subcontract, to demand a refund or take other appropriate measures if the Subcontractor is found to have been convicted of a narcotics offense or to have been engaged in drug trafficking as defined in 22 CFR Part 140.

2.16 Reporting Waste, Fraud, Abuse, and Theft

The Subcontractor shall notify the EnCompass Contracting Representative and the Chief of Party of any instances of suspected waste, fraud, abuse, loss, or theft of Subcontractor or Government-furnished property by employees or Subcontractors.

2.17 Foreign Corrupt Practices Act

The Subcontractor shall comply fully with the anti-bribery provisions of the U.S. Foreign Corrupt Practices Act, as amended ("FCPA"), as well as the a) UN Conventional against Corruption (UNICAC), b) OECD Convention on the Bribery of Foreign Public Officials (OECD Convention); and c) any other applicable local anticorruption laws, rules, and regulations if any part of this Agreement, or any Subcontract issued hereunder, will be performed outside of the United States of America.

The Subcontractor acknowledges and agrees that it is unlawful for the contractor and/or any officer, director, employee or agent of the contractor to make any kind of offer, payment, promise to pay, or authorization of the payment of any money, or offer, gift, promise to give, or authorization of the giving of anything of value to:

- A foreign official (or foreign political party) for purposes of either influencing any act or decision of such foreign official in his official capacity.
- A person, that could offer, give or promise monies or something of value, either directly or indirectly, to any foreign official (or foreign political party), or to any candidate for foreign political office.

Under this Agreement, a "foreign official" is any appointed, elected, or honorary official or employee of a foreign government or a public international organization, or any person acting in an official capacity for or on behalf of any such government or department, agency, or instrumentality, or for or on behalf of any such public international organization (e.g., the World Bank, UN, DFID, or WHO).

For purposes of this Article, the "government" includes any agency, department, embassy, or other governmental entity, and any company or other entity owned or controlled by the government.

The Subcontractor agrees not to interact with any government official, political party, or public international organization on behalf of the Prime Contractor, without prior written authorization, outside of contractor's performance of the Statement of Work.

2.18 Code of Ethics

Encompass has established high ethical standards for its employees, subcontractors, independent contractors, and vendors. Encompass adheres to its Code of Ethics and all U.S. and non-U.S. laws and regulations. Under the terms of this Agreement, Subcontractor is required to maintain a Code of Business Ethics and Conduct in compliance with FAR 52.203-13. Subcontractor is required to report any violation of the Subcontractor's Code of Business Ethics and Conduct committed by an employee(s) of either party, or anyone affiliated with the Subcontractor, to Encompass.

2.19 Fly America Act

The Offeror must comply with Fly America Act restrictions for all international travel under this award.

1. The recipient must use U.S. Flag Air Carriers for all international air transportation (including personal effects) funded by this award pursuant to the Fly America Act and its implementing regulations to the extent service by such carriers is available.
2. In the event that the recipient selects a carrier other than a U.S. Flag Air Carrier for international air transportation, in order for the costs of such international air transportation to be allowable, the recipient must document such transportation in accordance with this provision and maintain such documentation pursuant to the Standard Provision, “Accounting, Audit and Records.” The documentation must use one of the following reasons or other exception under the Fly America Act:
   A. The recipient uses a European Union (EU) flag air carrier, which is an airline operating from an EU country that has signed the US-EU “Open Skies” agreement

(http://www.state.gov/e/eb/rls/othr/ata/i/ic/170684.htm)

B. Travel to or from one of the following countries on an airline of that country when no city pair fare is in effect for that leg (see http://apps.fas.gsa.gov/citypairs/search/):
   - Australia on an Australian airline,
   - Switzerland on a Swiss airline, or
   - Japan on a Japanese airline;

C. Only for a particular leg of a route on which no US Flag Air Carrier provides service on that route;

D. For a trip of 3 hours or less, the use of a US Flag Air Carrier at least doubles the travel time;

E. If the US Flag Air Carrier offers direct service, use of the US Flag Air Carrier would increase the travel time by more than 24 hours; or

F. If the US Flag Air Carrier does not offer direct service,
   - Use of the US Flag Air Carrier increases the number of aircraft changes by 2 or more,
   - Use of the US Flag Air Carrier extends travel time by 6 hours or more, or
   - Use of the US Flag Air Carrier requires a layover at an overseas interchange of 4 hours or more.

Definitions

The terms used in this provision have the following meanings:

1. “Travel costs’’ means expenses for transportation, lodging, subsistence (meals and incidentals), and related expenses incurred by employees who are on travel status on official business of the recipient for any travel outside the country in which the organization is located. “Travel costs” do not include expenses incurred by employees who are not on official business of the recipient, such as rest and recuperation (R&R) travel offered as part of an employee’s benefits package that are consistent with the recipient’s personnel and travel policies and procedures.
2. “International air transportation" means international air travel by individuals (and their personal effects) or transportation of cargo by air between a place in the United States and a place outside thereof, or between two places both of which are outside the United States.
3. "U.S. Flag Air Carrier" means an air carrier on the list issued by the U.S. Department of Transportation at http://ostpxweb.dot.gov/aviation/certific/certlist.htm. U.S. Flag Air Carrier service also includes service provided under a code share agreement with another air carrier when the ticket, or documentation for an electronic ticket, identifies the U.S. flag air carrier’s designator code and flight number.
4. For this provision, the term “United States” includes the fifty states, Commonwealth of Puerto Rico, possessions of the United States, and the District of Columbia.

3 INSTRUCTIONS TO OFFERORS

EnCompass requests proposals by the issue of this RFP for the supply of services as specified in Part I and Attachment A.

3.1 Due Date

Your proposal is due electronically with all required signatures, no later than the date noted in the RFP Schedule above. Please be advised that late or incomplete submissions may be considered non-responsive and may not be considered for award.

3.2 Proposal Validity Period

The Offeror’s proposals will be considered valid for 90 days after submission.

3.3 Responsibility for Compliance with Legal Requirements

The offeror’s products, services, and facilities shall be in full compliance with all applicable federal, and local laws, regulation, codes, standards, and ordinances, regardless of whether or not they are referred to by herein. The submission of a proposal to EnCompass in response to this RFP constitutes an offer to which the Offeror agrees to the terms and conditions in this RFP and any attachments.

3.4 Reservation of Rights

EnCompass reserves the right to not issue an award based on proposals received in response to this RFP. EnCompass reserves the right to cancel this procurement at any time without prior notice, and to reject any or all responses received.

The RFP does not commit EnCompass to make any award or to pay any costs incurred in the preparation and submission of the proposal. EnCompass may cancel this RFP or any part of it. EnCompass reserves the right to reject any and all proposals, and to waive any informality in received proposals. In addition, EnCompass reserves the right to establish a competitive range of one or more Offerors and conduct further negotiations concerning price and other terms before awarding the contract, or to award without discussions.

An Offeror selected under this solicitation is not authorized to incur costs prior to receiving EnCompass’ written authorization.

EnCompass requires that Offerors observe the highest standard of ethics during the procurement and execution of subcontracts. In pursuance of this policy, EnCompass defines the terms set forth below as follows:

- "Corrupt practice" means the offering, giving, receiving or soliciting, directly or indirectly, of anything of value to influence the action of an EnCompass individual in the procurement process or contract execution

- "Fraudulent practice" means a misrepresentation or omission of facts in order to influence a procurement process or the execution of a contract
- "Collusive practices" means a scheme or arrangement between two or more Offerors, with or without the knowledge of EnCompass, designed to establish prices at artificial, noncompetitive levels
- "Coercive practices" means harming or threatening to harm, directly or indirectly, persons or their property to influence their participation in a procurement process, or affect the execution of a contract

EnCompass will reject a recommendation for award if it determines that the Offeror recommended for award has, directly or through an agent, engaged in corrupt, fraudulent, collusive, or coercive practices in competing for the contract in question.

3.5 Eligibility and Size Designation

Offerors shall provide evidence to verify that they:

- Have the legal capacity to enter into a subcontract with EnCompass.
- Are not insolvent or bankrupt and have not had their business activities suspended or been the subject of legal proceedings for any of the foregoing.
- Have fulfilled and are up to date with their tax and legal obligations.
- Have or are able to obtain a Unique Entity ID (UEI) number prior to subcontract award.

3.6 RFP Clarifications and Amendments

An Offeror may request clarification of the RFP terms in English by e-mail to jtra@encompassworld.com no later than August 12, 2024, at 6:00pm Eastern Time. EnCompass will respond in writing to all requests for clarification, provided that such requests are received by the date and time indicated. Should a clarification result in changes to the RFP, EnCompass will issue an amendment if necessary.

At any time prior to the deadline for submission of proposals, EnCompass may modify the RFP by issuing an amendment. Any amendment issued shall be part of the RFP and will be communicated in writing by email to all Offerors. To give prospective Offerors a reasonable period to incorporate the amendment terms in their proposals, EnCompass may, at its discretion, extend the deadline for the submission of proposals in writing.

3.7 Cost of Preparation of Proposals

Offerors are responsible for all costs incurred in preparing or responding to this RFP. All materials and documents submitted in response to this RFP become the property of EnCompass. This RFP does not obligate EnCompass to compensate for costs associated with the preparation of an Offeror's proposal.

3.8 Language of Proposal

The proposal, as well as all correspondence and documents relating to the proposal the offeror and EnCompass exchange shall be written in English. Supporting documents that are part of the proposal may be either in Spanish or English.

3.9 Period of Validity of Proposals

Proposals shall remain valid for a period of 90 days after submission. A proposal valid for a shorter period shall be rejected as non-responsive. EnCompass may ask Offerors to extend the validity period of their proposals in writing if necessary.

3.10 Late Proposals

EnCompass will not consider any proposal received after the deadline for submission. Any proposal received after the deadline will be returned to the Offeror with notice of rejection.

3.11 Annulment of RFP

EnCompass reserves the right to annul the proposal process and reject all proposals at any time prior to completion of the procurement process or award, without thereby incurring any liability to Offerors.

3.12 Withdrawal, Substitution, and Modification of Proposals

An Offeror may withdraw, substitute, or modify their proposal after the submission by sending a written notice, duly signed by an authorized representative. Proposals requested to be withdrawn will be returned unopened to the Offerors.

No proposal may be withdrawn, substituted, or modified in the interval between the deadline for submission of proposals and expiry of the period of proposal validity.

3.13 Confidentiality

Information related to the examination, evaluation, comparison, and post-qualification of proposals, and recommendation of award shall not be disclosed to Offerors or any other persons not officially concerned with this RFP process until information on award is communicated to all Offerors.

Any effort by an Offeror to influence EnCompass in the examination, evaluation, comparison, and post-qualification of an offer or an award decision will result in the rejection of their proposal.

From the proposal opening to award, Offerors may contact EnCompass on any matter related to the RFP process in writing.

3.14 Award Without Discussions

Awards may be made based on initial proposals and without holding discussions.

3.15 Notification of Award

Prior to expiry of the period of proposal validity, EnCompass shall notify in writing the successful Offerors that their proposals have been accepted. At the same time, Offerors not receiving awards will be notified that they will not receive an award.

3.16 Preparation of Proposals

Offerors will submit the following documentation:

- Volume 1 - Technical Proposal
- Volume 2 – Price/Business Proposal

3.16.1 VOLUME 1 - TECHNICAL PROPOSAL

The technical proposal will include the following sections.

- Cover Letter
- Executive Summary
- Technical Approach to Scope of Work
- Management Plan
- Past Performance

Pages are defined as:

- 8.5X11,
- 1 inch margins (top, bottom, left, and right)
- Font Arial 10pt
- Line spacing 1.15
- Paragraph spacing 1.5

1. **Cover Letter**:

A cover letter shall be included with the proposal on the Offeror's company letterhead with a duly authorized signature. The cover letter shall include the following items:

- Contact person
- Name of organization(s) submitting proposal
- Address of organization
- Organization telephone numbers
- Email of contact person

- Acknowledgement of solicitation amendments received
- Certification of a 90-day validity period for proposed prices

2. **Executive Summary** (not to exceed 1 page)

Offers must summarize the Offeror's overarching approach they will take to providing the services requested herein. Offeror must briefly describe their organization's ability to undertake activities, as well as technical and managerial resources of the organization.

3. **Technical Approach to Scope of Work** (not to exceed 8 pages, inclusive of graphs and tables).

The Technical Approach should demonstrate the offeror's ability and expertise to deliver a solution that meets the established needs and purpose of the solicitation. Offeror's proposed solution should align with the goals stated in the Summary Scope of Work.

To streamline selection committee review, the offeror shall organize its Technical Approach using subheadings consistent with the five bullets below.

1. Understanding of the technical challenge and ability to meet the technical requirements expressed in the solicitation. Include discussion of how the offeror will ensure timely delivery given the challenge and requirements.
2. Brief description of the advantages and disadvantages of each of the following approaches when migrating from Drupal 7 to the most recent version of Drupal:
    a. A 1:1 approach – make a copy of the Drupal 7 site using the most recent version of Drupal.
    b. A reinvention approach – start with the basic requirements and choose how to move forward.
3. Knowledge and experience with Agile implementation, including but not limited to the following:
    a. Management of an Agile software development methodology;
    b. User Story management, sizing, and estimation method;
    c. Techniques for release planning;
    d. Plans for engaging end users;
    e. Methods for capturing and applying lessons learned, testing processes, reasons behind the composition of their Agile teams;
    f. Rationale behind the proposed development talent and project oversight
    g. How they will make resources available within schedule and budget constraints; and
    h. Approach to configuration management.
4. How code development efforts will be managed across multiple developers working to create a complex site on a short schedule. Include topics such as, but not limited to:
    a. Local development practices
    b. Branch management
    c. Server-based environments
    d. Back up processes

5. Ability to execute the phased approach described in Section 1.3.2, Summary Scope of Work or propose alternatives, including justifications for said alternatives.

4. **Management plan** (not to exceed 2 pages, exclusive of tables and CVs)

The Offeror shall propose a management plan that includes all technical and administrative staff required to execute the scope of work. The offeror shall:

1. Describe methodology to staff a complex development effort, including iteration team composition and oversight, and coordination with GHTASC stakeholders.
2. Complete the following tables:
   a. Table 1: Required Positions. See further detail in "staffing requirements."
   b. Table 2: Other Positions. Offeror may add rows as desired.
3. Attach CVs (not to exceed two pages each) as attachments to Volume 2 that describe qualifications and experience relevant to this subcontract's scope of work and description of duties in Tables 1-2. The CVs must be included for all required positions. The Offeror may choose to provide CVs for up to three additional positions in Table 2 at their discretion.

Note: Offeror must not include any labor rates or other financial information in the Technical Proposal.

Staffing requirements:
The Project Manager and Senior Systems Administrator / Architect are required positions and must be identified by name. The Offeror may choose to propose more than one person for each role or combine the roles. Individuals filling these required positions should be proficient in English speaking and writing and available for meetings between 9:00 am - 4:00pm US Eastern time.

Table 1: Required positions
The first row includes completion instructions in blue font that apply to all rows. Offeror should delete these instructions once the table is complete.

Position title	Name	Description of duties
Project Manager [If desired, input alternate Contractor position title in parenthesis]	[required]	Primary management point of contact with EnCompass. Responsible for supervision and management of the Contractor's personnel, technical assistance, and interface and compliance with instructions from EnCompass and terms of the subcontract. [Offeror may input additional duties as desired]
Senior Systems Administrator / Architect	[required]	Primary technical point of contact with EnCompass. Responsible for: • Analysis and product roadmap for implementation. • Selecting correct technologies and software architecture to meet the requirements in Attachment A.

		• Integration of all coding efforts • Enhancing and maintaining a Drupal-based Federal website using best practices, industry standards, CI/CD, and agile processes.

Table 2: All other positions

The first row provides an illustrative example in blue font to demonstrate suggested level of detail. Offeror should delete this example once the table is complete. Offeror may include as many rows as desired.

Position title	Description of duties
Example: Front-end developer	Example: Provide development efforts associated with building the theme and to ensure Section 508 compliance.

5. Past Performance (not to exceed 5 pages)

Provide a concise description of the company's past and present experience that have a direct relationship with Sections 1.3 Summary Scope of Work, 1.4 Summary Site Development Requirements, 1.5 Required Vendor Experience, and Attachment B. (Up to 2 pages)

Using Attachment B, the offeror should also list a minimum of two and not more than three projects with detailed description of project value, period of performance, principal activities and results, client, and client contact information for references. (Up to 3 pages)

3.16.2 VOLUME 2 – PRICE/BUSINESS PROPOSAL

1. Legal Documents

Offerors must submit the following documentation to meet the requirements of the RFP.

- Incorporation or business registration
- The registration documentation must prove at least 3 years of existence
- Completed and signed Representations and Certifications (Attachment C)
- Completed and signed Evidence of Responsibility Certification (Attachment D)
- Completed and signed EnCompass Subcontractor/Vendor Questionnaire (Attachment E)

Scans of these documents must be legible and complete.

2. Proposed Prices

The offeror shall prepare an Excel budget using the template provided in Attachment F. The positions listed in the budget should match those provided in Tables 1 and 2 of the Management Plan in the technical volume.

The offeror will provide a Burdened Hourly Billing Rate schedule for all positions that include base salary plus any and all indirect costs, such as fringe, overhead, fees, and any other benefits.

Development of a new GHeL Center website and migration of existing content, custom data and users to the new site version is the primary purpose of the subcontract. In addition, EnCompass may authorize specific site enhancements or new features either at the start or throughout the subcontract period of performance. EnCompass recognizes that there may be task timing or cost implications depending on if or when enhancements are authorized. Therefore, the offeror shall prepare two budget scenarios:

- Scenario 1: All development (new platform, migration, and offeror-proposed enhancements and new features) is authorized at the start of the subcontract.
- Scenario 2: New platform development and migration are authorized at the start of the subcontract. Offeror proposed enhancements and new features are separately authorized on a case-by-case basis during Phase 2.

3. Budget narrative (up to 3 pages)

The offeror's cost proposal will include a Budget Narrative that:

- Describes method to estimate labor volume to the anticipated tasks in the scope of work. At the offeror's discretion, this may include tasks not described in this solicitation that the offeror deems necessary to achieve objectives.
- Describes the purpose of any materials needed to achieve the scope of work.
- Provides rationale for any labor or material differences between Scenarios 1 and 2.

All significant subcontractors, consultants and/or vendors (those amounting to 10% or more of proposed budget) must indicated in the budget and budget narrative.

3.17 Proposal Submission

Offerors must submit two separate files in the specified format by email to the address identified on the cover page of this RFP, and by the date and time stipulated.

Technical Proposals must not refer to pricing data so that the technical evaluation can be made strictly on the basis of technical merit.

- **Volume 1** – Technical Proposal – in Word or in PDF format

- **Volume 2** – Price/Business Proposal – Budget should be an unlocked Excel file using the template provided in Attachment F. The Budget Narrative shall be in Word or PDF format.

4 EVALUATION AND QUALIFICATION CRITERIA

4.1 Criteria

To be acceptable and eligible for evaluation, proposals must be prepared in accordance with Part III–Instructions to Offerors and meet all the requirements set forth in the other sections of this solicitation.

Determination of a proposal's responsiveness will be based on the contents of the proposal itself.

A substantially responsive proposal is one that conforms to all the terms, conditions, and specifications of the RFP without material deviation, reservation, or omission. A material deviation, reservation, or omission is one that:

- Affects in any substantial way the full presentation of services and experiences.
- If rectified, would unfairly affect the competitive position of other Offerors presenting substantially responsive proposals.

Technical, cost, and other factors will be evaluated relative to each other, as described herein.

The technical proposal will be scored by a technical evaluation committee using the criteria shown later in this section. The criteria are presented by major category, with relative order of importance, so that Offerors will know which areas require emphasis in the preparation of proposals. Offerors should note that these criteria serve: (1) as the standard against which all proposals will be evaluated, and (2) to identify the significant matters Offerors should address in their proposals.

The Price/Business proposals will be evaluated for a best-value determination based on the offer's technical score and favorable price comparison and analysis.

The evaluation procedures are set forth below:

1. Initial Evaluation

EnCompass will examine Volumes 1 and 2 to determine the completeness of each and ensure that the Offeror is qualified and eligible to receive a contract. If any of the required legal documents is missing, EnCompass, at its discretion, may contact the Offeror and request they provide the missing legal documentation. Offerors are encouraged to provide justification for any documentation they are not able to provide in the proposal. EnCompass, at its discretion, will take into consideration any justification provided so long as it is sound and EnCompass can meet USAID's procurement requirements.

2. Technical Evaluation (70 points)

After the Initial Evaluation EnCompass will review the proposals remaining for consideration to determine technical acceptability. EnCompass will consider the following evaluation criteria in determining the acceptability of the technical proposal. To be considered technically acceptable, the technical proposal must conform to the requirements of the solicitation and get at least 50/70 points.

Technical Approach (40 points)

- A clear understanding of the Scope of Work
- Extent to which responses to the five bullets under "Technical Approach to Scope of Work," Section 3.16.1 demonstrate an understanding and approach that is conceptually appropriate, clear, logical, well-conceived, and feasible. Bullet points are listed in order of importance, and points will be awarded accordingly.

Management Plan and Staffing (20 points):

- Adequacy of methodology to oversee a complex development effort.
- Reasonability of number and types of staff needed to achieve the scope of work.
- Demonstrates the staff have the required qualifications and experience necessary to achieve the scope of work.

Experience and Past Performance (10 points):

- Evidence of offeror qualifications against requirements in Section 1.5 “Required Vendor Experience”
- Demonstrates the skills necessary to meet the Detailed Statement of Work.

EnCompass may check references. The Offeror must include this information in the template provided as Attachment A.

3. Price/Business Proposal Evaluation (30 points)

The price evaluation will include:

- Alignment and reasonability of number of hours proposed with the technical approach
- Analysis of the reasonability of prices proposed
- Comparison of Offeror’s prices proposed and prices for same/similar services needed

Prices deemed advantageous to EnCompass will support a best-value award of highly rated technical proposals.

4.2 Determination of Competitive Range and Award

1. Competitive Range

Competitive Range may be established for the most highly rated proposals with the number of proposals in the competitive range to be determined.

EnCompass may limit offers in the competitive range to the greatest number that will permit an efficient competition among the most highly rated offers. EnCompass may exclude an offer if it is so deficient as to essentially require a new technical proposal. EnCompass may exclude an offer with unreasonable prices in relation to more competitive offers. EnCompass may exclude an offer requiring extensive discussions, a complete rewrite, or major revisions, such as to allow an Offeror unfair advantage over more competitive offers.

EnCompass intends to issue one award resulting from this solicitation to the responsible Offerors whose proposals represent the best value after evaluation in accordance with the factors in this solicitation.

2. Award Criteria

Proposals that represent the best value will be eligible for award. Best value will be offers that provide the greatest overall benefit in response to the requirements: high technical score, and acceptable and reasonable prices after analysis and comparison.

A technical and price trade-off analysis will be performed to determine the best value to the program. EnCompass will not select an offer for award on the basis of a superior technical proposal without consideration of the prices proposed.

The EnCompass team, in consultation with the home office Contracts Representative (and others as designated), will compare proposed prices and make a determination that the rates are reasonable, or request a best and final offer on the proposed prices.

3. Responsibility Determination

Prior to entering into any type of agreement with an Offeror, EnCompass will ensure the Offeror's responsibility, by reviewing the following:

1. Evidence of a UEI number.
2. The source, origin and nationality of the products or services are not from a Prohibited Country (explained below).
3. Offeror has adequate financial resources to finance and perform the work or deliver goods or the ability to obtain financial resources.
4. Ability to comply with required or proposed delivery or performance schedules.
5. A satisfactory past performance record.
6. A satisfactory record of integrity and business ethics.
7. Offeror has the necessary organization, experience, accounting and operational controls and technical skills.

8. Is qualified and eligible to perform work under applicable laws and regulations.

EnCompass LLC

5 ATTACHMENT A: Detailed Scope of Work and Requirements

Given this project is an upgrade to an existing site, we already know what we need and have the resources to document details often gathered via a Discovery interview. These details are provided in the RFP to support a cost-effective and timely process to help offerors ensure they have the experience needed to develop and migrate to such a site on schedule.

As a result of our efforts, we anticipate that a proposed discovery phase can:

- Cover an internal review of the site code, database, and documented requirements;
- Include time to seek clarifications of that presented in Attachment A; and
- Explore migration challenges and best practice implementation strategies.

5.1 Deliverables

In addition to the new Global Health eLearning website, the offeror will provide

- **Schedule** - list of tasks and anticipated start/completion dates
- **Design Plan** which includes:
  - **Wireframes** - for each type of page. displays all possible features for the page enabled
  - **Color plan** - that meets Section 508 color contrast requirements
  - **Mockups** - wireframe with colors
  - **Theme regions plan** – Regions that will support the content layouts.
- **Development plan** -
  - Using the requirements provided here and during discovery, document the agreed upon implementation strategies
  - Provide a list of all custom modules, the requirement(s) they met, and their status with regard to Drupal's major and minor versions.
- **Site Documentation** - how-to guide for site administrators; tasks consistent with UAT tasks.
- **Site Code –** the new website including all code, resources, media, etc. created for this project will be placed on a FedRAMP hosting account provided by Encompass, LLC.

All phases of the process needed to meet the requirements are to be defined by the Vendor in their proposal.

5.1.1 THEME

The proposed theme, demonstrated via the Design Plan, which includes wireframe, color plan, mockup, theme regions plan will reflect an interface that is managed via Drupal's core configuration options and/or contributed modules whose purpose is to provide additional layout support. If the Layout and/or Context modules are being considered in the proposed cost, their use must be justified and approved as part of the proposed theme and prior to theme development. Fixed page templates, code that overrides configuration options, must also be approved prior to development.

5.2 Site Migration

As explained in Part I, the **Site migration** line item focuses on the most important aspects of the GHeL site as we move from Drupal 7 to a new Drupal version, while at the same time, taking advantage of new or improved implementation and configuration strategies for managing and displaying content. This includes a right to change our approach to rebuilding the site, with an alternative implementation strategy that can still meet all our needs.

Background, requirements, and bidding instructions are provided in this section via the following perspectives:

- User Access and Legal Requirements
- Coding Practices
- Features
- Content Types and Purpose
- Personas/Roles/Tasks

5.2.1 USER ACCESS AND LEGAL REQUIREMENTS

All applicable aspects of the new GHeL site must meet the following.

- Section 508
    - At a minimum, the current compliance requirements stated in Section 508.
    - The preferred level of accessibility is the most recent Web Content Accessibility Guidelines (WCAG) international standard.
- Legal acknowledgements
    - Display of media licensing requirements
    - Display of content rights
- Multiple screen displays
    - Responsive to accommodate screen resolutions for mobile, tablet, and computer.
- Browsers
    - At a minimum, the site should be accessible in Chrome and Edge.
    - Browser versions from January 2023.
    - The site will not require add-on functionality to a browser to ensure a site feature functions.
- User data collection
    - The site will meet the European Data Act requirements https://www.eu-data-act.com/
    - The site will pass usage data to the current Google Analytics account.

If the vendor knows of any legal restraints that our site must meet, over and beyond that listed here, their proposal should demonstrate their understanding and preparedness to accommodate.

5.2.2 CODING PRACTICES

As stated in Section 1.5 of this RFP, vendors need experience with Drupal's semantic versioning approach to development and how to ensure the new GHeL site can remain in sync with major and minor version releases. The website being developed under this contract will be updated for each minor and major version of Drupal after its initial launch.

To accomplish this, the following is required:

- All custom code will be developed with current and future Drupal APIs, if available.
- Inline comments in the custom coded modules indicating the need for updated APIs will be included.
- A list of contributed modules and custom modules missing the next generation of APIs

In addition to API coding practices, all custom features and module overrides should be bundled into custom modules based on the purpose of the code or the feature being supported. The objective is to streamline efforts to update similar custom code as future APIs come available. Lastly, all custom modules will be documented, including but not limited to an explanation as to their purpose and any configuration features they may include.

5.2.3 FEATURES

The following feature descriptions go beyond the high-level view presented in the overview section of the RFP.

- eLearning
- Engagement and User communication
- Dashboard
- Find Content
- Marketing
- Site Reports and Management Features

5.2.4 ELEARNING

As stated in Section 1.2, the GHeL Center platform delivers self-paced eLearning courses to over 400,000 active users around the world. This is accomplished using full courses and mini courses. Courses are then bundled, if applicable, into programs of learning. Learners can achieve Certificates of Completion for both courses and programs.

The learners on the site can be using a wide range of devices and be on internet connections that vary widely in bandwidth. Therefore, any solution designed and developed must be done so to meet both mobile and non-mobile devices screens and low bandwidth connections. As such, the course interface and its content must be easy to read and quickly consumable. It must also be presented such that course pages can be reviewed at any time, in any sequence.

The plan is to continue this delivery approach. However, it is not required that the new site adopt the coding strategy used in the current site if other, more efficient, strategies are available. A less-is-more approach to using custom code is desired wherever possible.

The following sections provide more detailed requirements of the eLearning experiences however logging into the site and visiting a course will show other content details offered by the system.

- Courses
- Course Administration
- Learning Programs
- Certificates of Completion
- Community

Courses

There are two types of GHeL courses: full and mini.

Full course

A multi-page experience provides access to instructional content in multiple formats. A course includes sequenced pages after the course landing page:

- Session/Section pages
- Content pages
- Quizzes

Mini course

The only difference between a full course and mini course is the primary course of instruction delivery. A mini course delivers instructional content via a single media-based experience such as a PDF loaded into a viewing window.

Currently, the system creates a full course. The system admin deletes all the extra pages and checks a box to declare it a mini.

Shared course options

Both full and mini courses have the following shared features available as they are created via the same content type: course.

- Permissions
  - Users can access the content of a published course.
  - All users can access the course landing page if the course is not archived.
- Can currently include the following types of media with functionality that accommodates Section 508 requirements.

- Images: upload to the page and insert to the body field. Currently includes tools that enable authors to add alt and title as well as inserting captions under an image and long descriptions behind the image for use by assistive technology.
    - Videos: embedded via iFrame in the body field
    - Audio: embedded via link in the body field
    - Files: Multiple file formats including images can be uploaded to the page and inserted via link in the body field
    - Interactive experiences: such as HTML exports from Storyline are manually loaded to the server and linked via a Link field. See this course for an example: https://www.globalhealthlearning.org/course/pharmaceutical-systems-strengthening-101
    - Does not include uploading SCORM manifests and applicable assets.
- Includes the following content features in the right sidebar for both learner and edit mode:
    - Navigation bar which allows editors to change page order
    - Glossary term display per page and a link to all terms in a course
    - Reference page displays a node with all resources and citations
    - Feedback comment used when the course is in feedback mode
- Can be affiliated with a community experience that is currently created with Organic Groups
- Can be tagged as offering Continued Learning points.
- Can be featured and/or promoted (see Marketing and Engagement features)
- Quizzes: no restrictions on quantity or placement. A course can be completed successfully without passing any mid-course quiz.
- Final quiz: currently declared such because there aren't any pages following it. Successful completion measured by a final exam
- Course progress tracking enabling "Resume course" on the course landing page and available from Course in Progress link on the learner's dashboard.
- Option on the course landing page to render all course content pages as one HTML page. Currently, quiz questions aren't available in this printable format.

Course Specific Administration

There are four aspects of the life-cycle of course administration.

- Course creation
- Development tools
- Workflow
- Reporting

Course Creation

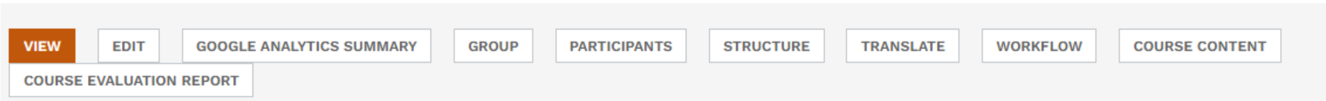
Currently, when the course content type is selected, a custom module is triggered and all aspects of the course template are created. That includes:

- Course landing page

- Five course sections
- Five course pages within each section
- Placeholders for two quizzes within each section
- Placeholder for one final exam
- One Reference page

Development Tools

After the course template is created, the process of copying content into the template begins. The following tools are available in the course toolbar to assist in that process to the current Staff role.



- Participants - Used to add members to the course who can edit or review. Currently, there is no distinction between a course author and a course reviewer when it comes to accessing a course that is offline. The Personas/Roles section below describes the roles and their tasks we would like to have.
- Structure - a page that allows the user to rearrange pages. Appears to be taken from the core Outline feature.
- Course content - a page that allow for bulk delete of course pages

In addition to the tabbed tools, the course development process includes the option for the developer to toggle between viewing the course pages as a Learner would see them, which is different from what the developer sees.

Workflow

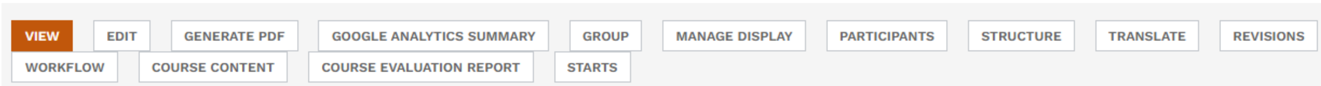
Initial development occurs, by default, in the Under Review stage of the workflow. Once the course is ready, it is moved to the Feedback stage, where the comment feature is enabled and comments are collected. Once the course is complete, it is Published. In order to update the course, it is placed in the Under Review stage again and the process starts over again. Once the course is ready to be taken offline for good, it is moved to the Archived stage. The course pages (landing page, section pages, course pages, and reference pages) are set to unpublished. Consideration will be given to including Quiz and Quiz questions nodes as well.

A workflow process, at a minimum, is required for course content management.

Currently, Workflow only applies to course content.

Reporting

Currently, there are four management tabs for a course. In the following Personas/Roles section, those management features still required will be assigned to the applicable role as well.



- Generate PDF - Unless this feature can generate Section 508 compliant PDFs, this will not be needed.
- Google Analytics Summary - If this is available, include it.
- Course evaluation report - data taken from the Webform results
- Starts - A View showing who has started the course, which is tracked by the Achievements module.

The administrative tabs, such as Manage Display, are for site administrators only.

Learning Programs

Historically, GHeL did not track program certificates earned. The new certificate management system, mentioned above, tracks earned and expired certificates and presents the learner a list of what they need to complete the program. If a course expires or a new course is added to the program, the certificate expires until the new requirement is successfully completed.

Certificates

Historically, tracking, and awarding certificates was managed by the Achievements module and custom code. In 2022, the transition to a redesigned certificate management system was launched, adding improved management options, and allowing users to see certificates that were once earned, even if they expired. The custom logic and historical records will migrate to the new version of the site. The options provided by the Achievements module, but not currently in use will be a topic for discussion as data tracking and engagement are addressed.

GHeL maintains a history of certificates earned and if they are current or expired. If a course name is edited, the system still sees the course as the same course asset but the historical name is maintained for the certificate.

Minimum requirements:

- Awarded after successful completion of a final exam
- Awarded after successful completion of a program
- Certificates are dynamically generated Section 508 compliant HTML pages
- Certificates of completion can be generated via a link on the dashboard and at the end of a successfully completed exam
- Current and expired certificates are marked accordingly and available for download

Community

Historically, it appears to have been used for select users to gather and share. The information gathered was then consolidated into PDFs and shared on the site. Organic Groups module was used to create the communities, as well as the courses. Customization was added to establish relationships between courses and programs. For an example, visit https://www.globalhealthlearning.org/course/episode-1-climate-and-health as anonymous and authenticated.

The goal of the community feature is to engage learners and subject matter experts in asynchronous activities. The requirements a community features includes:

- Permissions
    - Users can access published communities
    - With a link, anonymous can access the page but not the content associated with community
- Currently requires a relationship with a course group.
- Currently includes option for
    - Discussion: Online discussions with limits on media and links
    - Resources: nodes that allow links to various resources as well as a video field for embedding.

Action plan: it acts as a form, using multiple body fields

5.2.4.1 ENGAGEMENT AND USER COMMUNICATION

We have two types of engagement: passive homepage features (recently updated) and user triggered emails. Historically, emails have caused the following bounce issues:

- Invalid email entered in the system
- User marking GHeL emails as spam

After migrating the site to Acquia's FedRAMP hosting platform, we engaged their AWS email service. AWS's sensitivity to bounced messages pushed us back to using MailChimp to process all outgoing email.

GHeL uses the following to passively communicate with its users.

- Drupal default system messages
- Homepage features
    - Call to action: displays call to action nodes with links. Is ordered using the node queue module.
    - Sitewide banner via blocks.
    - Latest content offering via announcements displayed on the homepage.
- Current user-selected email notifications (found on the account registration form) for
    - Notify me when my certificates become outdated
    - Notify me of new content in my program groups
    - Remind me to complete courses I have started
    - Receive the Global Health Learning Center newsletter

5.2.4.2 DASHBOARD

Historically, the dashboard displayed statistical data not shown now. Given the number of records that SQL queries have to process in order to generate statistics, a strain was incurred on the system and the page was slow to load.

The dashboard is the landing page when a user logs in. It's the front door to what they are working on and what they still need to do when earning a program certificate. The certificate management system plays a prominent role in managing what gets displayed.

The goal is to reuse the logic of this recently redesigned, custom feature when building the new GHeL site. The dashboard currently displays:

- Courses started
- Course successfully completed with current and expired certificate links
- Programs started
- Program progress - courses successfully completed and those yet to complete

5.2.4.3 FIND CONTENT

Historically, The site uses Solr 7 and we anticipate using it in the future. At a minimum, the features that help users find content are currently in place will be needed. They include:

- Basic site search
- Course filters on the course and mini-course landing pages
- Traditional menus and separate submenus
- Course content menu

5.2.4.4 MARKETING

Historically, any active advertising of courses has been performed by the course authors outside the GHeL site. The GHeL site does not actively campaign for new users. It relies on word of mouth. Given that 3,000-6,000 new users per month, we don't need an active campaign. However, we offer passive promotions of content and other items via the homepage.

The following current marketing strategies will be required.

- Homepage features
  - Call to action: displays call to action nodes with links. Is ordered using the node queue module.
  - Sitewide banner via blocks.
  - Latest content offering via announcements displayed on the homepage.
- Site stats
  - 391,350 GHeL members …
  - from 253 countries and territories …
  - earned 883,681 certificates …
  - from the 96 courses offered.

5.2.4.5 SITE REPORTS AND MANAGEMENT FEATURES

Historically, reports were created using Views and were exportable. Given the number of records that can be included in a Views report, exporting became impossible. Several frequently used reports are custom SQL queries.

Reports

Our need to limit custom code, and hence the need for version updates, extends to reports, within reason. EnCompass will work with the vendor to prioritize reports and the strategies needed to build them. The following reports and their exports are a minimal requirement.

- Find a user
  - Purpose - manage one user or a group of users
  - Note: Currently this report duplicates admin/people to some extent due to Drupal 7s initial limitation for searching using admin/people. Search options should include the fields used in the registration form.
- New users
  - Purpose - to count the number of users added within a specific date range, with the option of counting based on a category used in the registration form.
- Certificate count
  - Purpose - to count the number of certificates earned in a given time period for all GHeL and for each course and program. It also includes the number of users who earned those certificates.
- Certificates earned by categories included on the user registration form
  - Purpose - to create charts and graphs for presentations.
  - Note: Currently, the process to count by category is done manually after export. The new report will create the totals, similar to the existing certificate count.
- Course management
  - Purpose - one stop view of the courses and their current state. Includes data drawn from existing fields in the Course content type.
- Various course content searches
  - Purpose - Searching across course pages for content that needs to be updated. Includes each field on a course page. Can also be a filtered parent course.
  - Note: It is assumed that existing Views serving this purpose will be obsolete and that new searches will be designed based on the field configuration of

Management Features

The inactive-user-purge process is currently the only user management feature but it includes several processes. Below are the current instructions posted to the site.

Phase I

1. Post an Announcement that account management is about to occur.
2. Generate a CSV file with a list of inactive user emails using the inactive users report. The parameters used in the past are

- The default filter is "all users that do not have a certificate" so that doesn't have a setting to initiate.
- The domain used in the past is usaid.gov but other domains can be added.
- Organization category from the user registration form used in the past is USG Agency - USAID.
- The cutoff date used in the past is one year since a user was last logged in.

3. Download the CSV file and review
    - Observe the number of potential deletes. Does it match the number rendered on the screen?
    - Are there any usaid.gov emails?
    - Are there any ghpod, encompass, or jhu domains (Old site admins)? These would be old site admins and maybe they need to be added to the filter if you want to keep them.
4. Create a MailChimp campaign to notify inactive users to login if they want to keep their account. See existing campaign in MailChimp.

Phase II

After users have a chance to log into their account, run the following purge process.

1. Generate an updated inactive user list to remove users that logged in or earned a cert to save their account using the inactive users report.
    - Use the same parameters you used in Phase I
    - Download the CSV file and do a quick review
        - Note the number of accounts to purge and compare to the Phase I count. Did it go down?
        - Do you see any email domains that have users you don't want to remove?
2. Block inactive users. This step makes it easier on the system to execute the user delete process. Go to the inactive users report.
    - Use the same parameters as those used in step one.
    - The start date should be the day you want the system to start the process of feeding the blocked users into the queue to be deleted. If you want time to unblock a user, set a date in the future to trigger the cron jobs.
    - Submit.
    - The users are now blocked.
3. The blocked-user-delete process will run on its own in cron. It will run in small batches over days so that the system doesn't become overwhelmed.
    - You will see the "inactive_user_deletion" cron job here: https://globalhealthlearning.org/admin/config/system/queue-ui.
    - DO NOT FORCE THE CRON JOB TO RUN
    - Testing this feature showed how it can overwhelm the server.
    - , using multiple body fields

5.2.5 CONTENT TYPES AND PURPOSE

There are currently 25 content types. All content (user added and system generated) must be translatable. User added content must be available to Views for queries.

5.2.5.1 COURSE RELATED

Courses can stand alone or be associated with a program. The following content types are used in the creation and organization of courses.

- Course (an Organic Groups node)
- Course section
- Course page
- Reference
- Quiz
  - Multiple choice question
  - Matching
  - True/false question
  - Quiz directions (currently not used)
- Program
- Webform - course evaluation

5.2.5.2 COMMUNITY RELATED

The following are course-adjacent in that they require a course but a course does not require them.

- Program Group (an Organic Groups node)
- Study Group (an Organic Groups node)
- Associated content for said groups:
  - Action plan
  - Discussion
  - Group Resource

5.2.5.3 SITE CONTENT RELATED

In addition to course content, the site currently uses the following content types available to anonymous users.

- Announcement
- Basic page
- Call to action
- FAQ
- Front page hero (deprecated)
- ghel_partner
- Webform (used for contact and surveys as needed)

- Seldom used and might not be needed again:
  - Site resource
  - Testimonial
  - Translation

5.2.5.4 PAGE FEATURES

No matter the content purpose, the following features are required.

- Translatable
  - All system generated content should be automatically translated
  - All user entered content, including that in Taxonomy and blocks, will be translatable
- Formattable
  - Content authors need to be able to apply HTML to content entered.
  - Page specific styling is not permitted
- Responsive up to 3 break points

5.2.5.5 PERSONAS/ROLES/TASKS

There are currently eight roles over and beyond Drupal's three default roles. As part of the migration process, the desire is to remove, rename, or add roles to be consistent with the migrated and potentially enhanced features. The following are the anticipated roles.

- Anonymous
- Learner (default authenticated role)
- Course author
- Course reviewer
- Courses admin
- Community manager
- Translation editor
- Content admin
- Site admin (same permissions as those given to user 1)

Below are descriptions of each role and the users expected to fill the roles.

5.2.5.6 ANONYMOUS

- Permissions include
  - Not logged in
  - At a minimum, access to view Site Content Related nodes
- Demographics
  - Located globally

- Literate
- Students thru professionals
- Employed or student
- Often needs the certificates earned from the courses in this site as proof of taking the course

- Tasks include but not limited to:
  - Navigate anonymous pages: general site content, course landing pages, FAQs, etc.
  - Create an account on the site and be granted access immediately.
  - Must complete a set of bio questions.
  - Has the option to sign up for various email notifications via signup.
  - Can sign up for social gaming options to be determined.
  - Can edit bio, notifications, and social gaming options.
  - Can use the contact form.
- Technology
  - 50% take the courses via their phone.
  - Connectivity can be slow given their mobile service provider.
  - Wide range of device operating systems

5.2.5.7 LEARNER

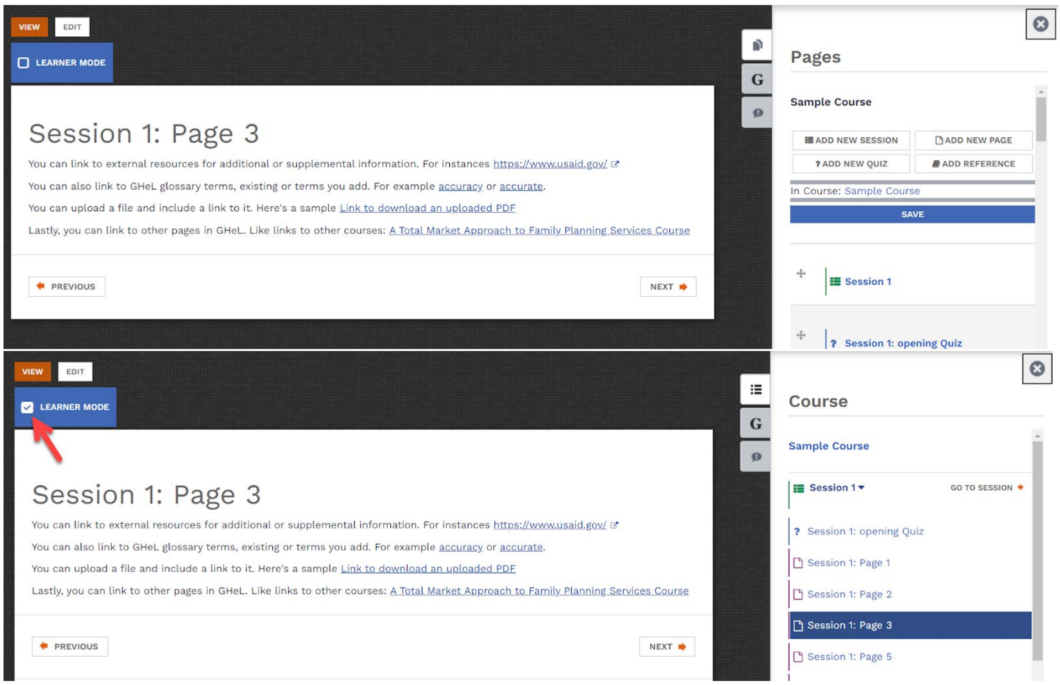
- Permissions include:
  - Same permissions as anonymous
  - Can access the course content after logging in as authenticated AND when the course is set to allow the authenticated user access.
  - Can access course landing pages while the course content is offline for development or update.
- Demographics:
  - Primary audience/user of the site
  - Located globally
  - Literate
  - Students thru professionals
  - Employed or student
  - Often needs the certificates earned from the courses in this site as proof of taking the course
- Learner Tasks include but not limited to:
  - Can take an online course, quizzes, exam.
  - Can access all of their course activity via a user default landing page dashboard.
  - Can return to the last page they on in the course.
  - Can print a course certificate.
- Technology
  - 50% take the courses via their phone.

- Connectivity can be slow given their mobile service provider.
- Wide range of device operating systems.

5.2.5.8 COURSE AUTHOR

- Permissions include:
  - Same permissions as the learner (authenticated)
  - Additional role: course author
    - Can access their offline course while the course is in update and/or feedback workflow status
    - Can perform the tasks assigned to them
  - Additional role: course reviewer
  - Optional other roles can be added
    - Translation editor - access to add translations to their course
    - Full HTML editor - access to using Full HTML in their course pages
- Demographics:
  - Similar to the learner
  - Content expertise or access to it
  - Media developer or access to it
  - Content author or a representative
  - Can be comfortable with online forms or can receive training on the forms
- Tasks include but not limited to:
  - Will access their courses via an author dashboard
  - Will use a filtered HTML editor for WCAG compliant formatting
  - Will need to integrate WCAG compliant images, audio, and embedded video within the narrative of the page using GUI options versus code
  - Can edit all course related page in their course
  - Can rearrange/reorder pages and sessions/module pages
  - Can add new pages
  - Can add new sessions/modules
  - Can delete pages
  - Can delete session/module pages
  - Can add a page for course references/bibliography
  - Can edit the reference/bibliography page
  - Can add a quiz
  - Can add questions to the quizzes
  - Can reuse questions on other quizzes
  - Can resolve comments on their course's pages
  - Can review learner course evaluations
  - Can use the author tutorials

- Can view/test the course pages in learner mode: how the learner will see the course interface. Samples of the current system accommodating this requirement are below; however, these are not necessarily the required new interface. Observe the changes when Learner mode is engaged.



- Technology
  - 50% take the courses via their phone
  - Connectivity can be slow given their mobile service provider
  - Wide range of device operating systems

5.2.5.9 COURSE REVIEWER

- Permissions
  - Learner role (authenticated)
  - Additional role: course reviewer
    - Can access their offline course while the course is in feedback workflow
    - Can perform the tasks assigned to them
- Demographics
  - Similar to learner
  - Similar to course author
- Tasks include but not limited to:
  - Will access their courses via an author dashboard
  - Can access the comment feature for a course related page

- Can view comments made on their course's pages
    - Can post comments
    - Can edit their comments
    - Can check a box to receive email notification when other comments are made or their comment is resolved
    - Can use the feedback tutorials
- Technology
    - 50% take the courses via their phone
    - Connectivity can be slow given their mobile service provider
    - Wide range of device operating systems

5.2.5.10 COMMUNITY MANAGER

- Permissions include
    - Learner role
    - Additional role: Community manager
        - Can access their offline community
        - Can perform the tasks assigned to them
- Demographics
    - Similar to learner
    - Similar to course author
- Tasks include but not limited to:
    - Can their own study group or program group
    - Can add, edit, delete any content nodes in their group
    - Can add, edit, delete comments
    - Receive email notifications for group posts: added nodes and comments
- Technology
    - 50% take the courses via their phone
    - Connectivity can be slow given their mobile service provider
    - Wide range of device operating systems

5.2.5.11 COURSE ADMINISTRATOR

- Permissions include
    - Learner role (authenticated)
    - Course reviewer
    - Course author
    - Community manager
    - Translation editor
    - Full HTML editor

- Additional role: course administrator
  - Can perform the tasks assigned to them
- Demographics
  - Likely an instructional technologist or instructional designer
  - Will be online savvy
  - Likely to be media development savvy
  - Able to teach course authors and reviewers how to use the system
  - Familiar with WCAG
  - Familiar with media licenses
- Tasks include but not limited to:
  - Will access their courses via an author dashboard
  - Can access/edit/add/delete any course or course page
  - Can change a course workflow state
  - Can execute the certificate republish feature
- Technology
  - Likely to have access to high speed internet
  - Might use multiple devices

5.2.5.12 CONTENT ADMINISTRATOR

- Permissions
  - Learner role (authenticated)
  - Course reviewer
  - Course author
  - Course administrator
  - Full HTML editor
  - Additional role: content administrator
    - Can perform the tasks assigned to them
- Demographics
  - Similar to courses administrator
  - Understands the overall goals of the site and non-course content
- Tasks include but not limited to:
  - Manages Warnings, Announcements, and more to be defined
  - Can access/edit/add/delete all content types
  - Can add users approved by the site admin to courses as an author or reviewer
  - Can add pages to menus
  - Can use the system content list to manage all site pages
  - Can use predefined administration tools to query course related statistics
  - Can use Google Analytics that are integrated into the site to query content related statistics

-
    -
- Technology
    - Likely to have access to high-speed internet
    - Might use multiple devices

5.2.5.13 TRANSLATION EDITOR (ADD-ON ROLE AS NEEDED)

- Permissions include
    - Access to the translation feature
- Tasks include but not limited to:
    - Translate site content

5.3 Site Enhancements

The following site enhancements divided into enhancements on existing features and new features.

Given the expense of ensuring we carry forward our existing features and functionality, we are interested in managing our wish list of enhancements. EnCompass recognizes that the timing of enhancement authorization may impact cost. See Section 3.16.2 Price/Business Proposal for costing instruction.

Enhancements of Existing Features

The following enhancements should be considered when selecting implementation strategies for existing features. The objective is to add such enhancements with minimal impact to the migration cost.

5.3.1 COURSE LANDING PAGE ACCESS

Currently, if a course is in production, its landing page is available to the anonymous. The only way to “hide” the landing page is to Archive the course. An enhancement would allow for specific roles to see a course landing page during the production process.

5.3.2 PUBLIC AND PRIVATE COURSE ACCESS

Historically, it is unclear how this was managed on the current site. There is evidence that suggests that Drupal’s Organic Groups for Drupal 7 was used as designed, thus allowing users with the Learner role to be manually added to a course as a Member. Attempts to recreate this setup using the custom Course content type have failed. It is believed that there are settings or custom code preventing a true, private course from being enabled.

In this enhancement, the goal would be to enable this option so that the following is an option:

- Public access by registered users
- Private access by course admin enrollment

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5.3.3 COURSE FINAL EXAM DECLARATION

Currently, the Final Exam is defined by it being the last page in the course. An enhancement would give us the option to include a final “Marketing” page after the final exam.

5.3.4 CONTINUOUS LEARNING POINTS

Currently, there is a checkbox declaring that a course is part of an approved Continuous Learning system where points are earned. An enhancement would provide a field for the points and text describing the continuous learning program. Each would be added to the display.

5.3.5 PUBLIC AND PRIVATE COMMUNITIES

Similar to the courses, a Learner can join a Study Group community if such a community is available. Similar to the Public versus Private Courses, a welcome enhancement would be allowing for a private community where only an administrator can add Members. Instead of requiring the community to be associated with a course or program, allow for a stand-alone community.

5.3.6 OFFLINE COURSE

Currently, an HTML summary of the content pages is offered for printing. Quizzes and Quiz Questions are not included. An enhancement would be to make the full course an offline option.

5.3.7 WORKFLOW EXPANSION

Currently, the workflow feature is assigned to the course pages. Other content types that warrant consideration are Announcement, Blog/Article, Basic page, community landing pages.

5.3.8 COMMUNICATION ENHANCEMENT

Historically, email notifications have been managed via the user’s profile page and no push notifications were an option. The following would be enhancements.

- The option for users to sign up for a newsletter separately from their profile.
- Additional email notifications and/or push notifications may also be considered.

5.3.9 DASHBOARD ENHANCEMENTS

In addition to what is already provided on the Dashboard, add a menu to how-to pages. Example pages include:

- FAQ and Answers such as printing certificates and changing the user’s name on the certificate.
- New course proposal form

5.3.10 SEARCH ENHANCEMENTS

Currently, the site uses Solr 7 and a traditional search results list. We would like to explore the option for a search that includes facets to filter the search further.

In addition to search facets, we also want to explore changing the /courses and /mini-courses filter to a faceted filter.

5.3.11 EXPANDABLE MENU

Currently, the main menu across the top of each page does not allow for submenus to drop down. We would like to explore this option.

5.4 New Features

5.4.1 COURSE PASS REQUIREMENTS

Currently, a Learner could use the side menu and navigate to the Final Exam, pass it, and get a certificate of completion without having taken the course. The enhancement would prevent that from occurring. One option would be to prevent access to the Final Exam until all pages have been opened, and/or pass the quizzes.

5.4.2 SITE USAGE TUTORIALS

Currently, there is an FAQ feature. However, if a multi-step tutorial is needed, and media is desired, the tutorial feature being considered would act as a supplement to the FAQ or a replacement.

This feature would offer permission-based text and/or video help for anonymous visitors, learners, authors, those providing feedback to courses. A site subsection would be created and a separate content type used. The option to sequence the pages would be required, similar to the Book module.

It is possible that links to tutorial pages will be included on the user's dashboard and will appear accordingly, based on their role.

5.4.3 BLOG OR ARTICLE

Currently, the announcement content type allows for the posting of an Announcement, Conference announcement, and Learner profile highlight. Such announcement types currently show on the bottom half of the homepage.

A blog or article feature would focus on quick, global health tips and facts that do not require a full or mini-course to present. They would not offer a certificate or be part of a program, nor would they be open to discussion. Each post would be allowed the option to add media. Hidden fields would gather post owner data, similar to that used on the course landing page. Posts would also be categorized. Lastly, a landing page would be required and would offer a faceted filter.

5.4.4 SYSTEM GENERATED PDFS

Historically, a module was used to convert an HTML page to a PDF that could be saved locally by a user. The two primary uses included:

- Printing the course - Using the feature from the Book module, that rolls all the book pages into one HTML page, the PDF generator would then create the PDF of the summarized pages.

- Certificate - The PDF module would convert an HTML certificate to a PDF that was downloaded by the user.

Attempts to make this conversion process Section 508 compliant have failed and the PDF feature is no longer an option. If a Learner wants a PDF version of the summarized course pages (a feature still enabled) and/or a PDF version of their certificate, they have to do it, thus taking responsibility for a non-compliant PDF.

Offering compliant PDFs would be a welcome enhancement.

5.4.5 STATISTICS DASHBOARD

Currently, site usage statistics are available from five locations:

- Site related statistics on the homepage
- Tab banner on the Course landing page
- Links added to the admin menu
- Searching the list of Views
- Google Analytics

The Statistics Dashboard would present statistics based on roles. It would provide links to reports and/or quick stats similar to those on the homepage. Most, if not all of the reports exist in the current site. This enhancement would require a planned set of quick stats and a page layout.

6 ATTACHMENT B: Past Performance Form

Past Performance Form	
Name of Contracting Client	
Contract Type	
Contract No.	
Period of Performance	
Contract value – award amount	
Client Contact Name:	
Client Contact Telephone No.	
Client Contact E-Mail Address	
Description of Work/Services	
Results (Describe specific results achieved)	
Issues *(If problems were encountered on this contract, provide explanation on corrective action taken)*	

7 ATTACHMENT C: Representations and Certifications

52.204-24 Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment (Nov 2021)

The Offeror shall not complete the representation at paragraph (d)(1) of this provision if the Offeror has represented that it "does not provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument" in paragraph (c)(1) in the provision at 52.204-26, Covered Telecommunications Equipment or Services—Representation, or in paragraph (v)(2)(i) of the provision at 52.212-3, Offeror Representations and Certifications-Commercial Products or Commercial Services. The Offeror shall not complete the representation in paragraph (d)(2) of this provision if the Offeror has represented that it "does not use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services" in paragraph (c)(2) of the provision at 52.204-26, or in paragraph (v)(2)(ii) of the provision at 52.212-3.

(a) Definitions. As used in this provision—

Backhaul, covered telecommunications equipment or services, critical technology, interconnection arrangements, reasonable inquiry, roaming, and substantial or essential component have the meanings provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

(b) Prohibition. (1) Section 889(a)(1)(A) of the John S. McCain National Defense Authorization Act for Fiscal Year 2019 (Pub. L. 115-232) prohibits the head of an executive agency on or after August 13, 2019, from procuring or obtaining, or extending or renewing a contract to procure or obtain, any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. Nothing in the prohibition shall be construed to—
(i) Prohibit the head of an executive agency from procuring with an entity to provide a service that connects to the facilities of a third-party, such as backhaul, roaming, or interconnection arrangements; or

(ii) Cover telecommunications equipment that cannot route or redirect user data traffic or cannot permit visibility into any user data or packets that such equipment transmits or otherwise handles.

(2) Section 889(a)(1)(B) of the John S. McCain National Defense Authorization Act for Fiscal Year 2019 (Pub. L. 115-232) prohibits the head of an executive agency on or after August 13, 2020, from entering into a contract or extending or renewing a contract with an entity that uses any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. This prohibition applies to the use of covered telecommunications

equipment or services, regardless of whether that use is in performance of work under a Federal contract. Nothing in the prohibition shall be construed to—

(i) Prohibit the head of an executive agency from procuring with an entity to provide a service that connects to the facilities of a third-party, such as backhaul, roaming, or interconnection arrangements; or

(ii) Cover telecommunications equipment that cannot route or redirect user data traffic or cannot permit visibility into any user data or packets that such equipment transmits or otherwise handles.

(c) Procedures. The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (https://www.sam.gov) for entities excluded from receiving federal awards for "covered telecommunications equipment or services".

(d) Representation. The Offeror represents that—

(1) It □ will, □ will not provide covered telecommunications equipment or services to the Government in the performance of any contract, subcontract or other contractual instrument resulting from this solicitation. The Offeror shall provide the additional disclosure information required at paragraph (e)(1) of this section if the Offeror responds "will" in paragraph (d)(1) of this section; and

(2) After conducting a reasonable inquiry, for purposes of this representation, the Offeror represents that—

It □ does, □ does not use covered telecommunications equipment or services, or use any equipment, system, or service that uses covered telecommunications equipment or services. The Offeror shall provide the additional disclosure information required at paragraph (e)(2) of this section if the Offeror responds "does" in paragraph (d)(2) of this section.

(e) Disclosures. (1) Disclosure for the representation in paragraph (d)(1) of this provision. If the Offeror has responded "will" in the representation in paragraph (d)(1) of this provision, the Offeror shall provide the following information as part of the offer:
(i) For covered equipment—

(A) The entity that produced the covered telecommunications equipment (include entity name, unique entity identifier, CAGE code, and whether the entity was the original equipment manufacturer (OEM) or a distributor, if known);

(B) A description of all covered telecommunications equipment offered (include brand; model number, such as OEM number, manufacturer part number, or wholesaler number; and item description, as applicable); and

(C) Explanation of the proposed use of covered telecommunications equipment and any factors relevant to determining if such use would be permissible under the prohibition in paragraph (b)(1) of this provision.

(ii) For covered services—

(A) If the service is related to item maintenance: A description of all covered telecommunications services offered (include on the item being maintained: Brand; model number, such as OEM number, manufacturer part number, or wholesaler number; and item description, as applicable); or

(B) If not associated with maintenance, the Product Service Code (PSC) of the service being provided; and explanation of the proposed use of covered telecommunications services and any factors relevant to determining if such use would be permissible under the prohibition in paragraph (b)(1) of this provision.

(2) Disclosure for the representation in paragraph (d)(2) of this provision. If the Offeror has responded "does" in the representation in paragraph (d)(2) of this provision, the Offeror shall provide the following information as part of the offer:

(i) For covered equipment—

(A) The entity that produced the covered telecommunications equipment (include entity name, unique entity identifier, CAGE code, and whether the entity was the OEM or a distributor, if known);

(B) A description of all covered telecommunications equipment offered (include brand; model number, such as OEM number, manufacturer part number, or wholesaler number; and item description, as applicable); and

(C) Explanation of the proposed use of covered telecommunications equipment and any factors relevant to determining if such use would be permissible under the prohibition in paragraph (b)(2) of this provision.

(ii) For covered services—

(A) If the service is related to item maintenance: A description of all covered telecommunications services offered (include on the item being maintained: Brand; model number, such as OEM number, manufacturer part number, or wholesaler number; and item description, as applicable); or

(B) If not associated with maintenance, the PSC of the service being provided; and explanation of the proposed use of covered telecommunications services and any factors relevant to determining if such use would be permissible under the prohibition in paragraph (b)(2) of this provision.

(End of provision)

52.204-26 Covered Telecommunications Equipment or Services-Representation (Oct 2020)

(a) Definitions. As used in this provision, "covered telecommunications equipment or services" and "reasonable inquiry" have the meaning provided in the clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

(b) Procedures. The Offeror shall review the list of excluded parties in the System for Award Management (SAM) (https://www.sam.gov) for entities excluded from receiving federal awards for "covered telecommunications equipment or services".

(c) (1) Representation. The Offeror represents that it □ does, □ does not provide covered telecommunications equipment or services as a part of its offered products or services to the Government in the performance of any contract, subcontract, or other contractual instrument.

(2) After conducting a reasonable inquiry for purposes of this representation, the offeror represents that it □ does, □ does not use covered telecommunications equipment or services, or any equipment, system, or service that uses covered telecommunications equipment or services.

(End of provision)

52.204-27 Prohibition on a ByteDance Covered Application (June 2023)

Vendor certifies to the following restrictions:

(a) Definitions. As used in this clause—

Covered application means the social networking service TikTok or any successor application or service developed or provided by ByteDance Limited or an entity owned by ByteDance Limited.

Information technology, as defined in 40 U.S.C. 11101(6)—

(1) Means any equipment or interconnected system or subsystem of equipment, used in the automatic acquisition, storage, analysis, evaluation, manipulation, management, movement, control, display, switching, interchange, transmission, or reception of data or information by the executive agency, if the equipment is used by the executive agency directly or is used by a contractor under a contract with the executive agency that requires the use—

(i) Of that equipment; or

(ii) Of that equipment to a significant extent in the performance of a service or the furnishing of a product;

(2) Includes computers, ancillary equipment (including imaging peripherals, input, output, and storage devices necessary for security and surveillance), peripheral equipment designed to be controlled by the central processing unit of a computer, software, firmware and similar procedures, services (including support services), and related resources; but

(3) Does not include any equipment acquired by a Federal contractor incidental to a Federal contract.

(b) Prohibition. Section 102 of Division R of the Consolidated Appropriations Act, 2023 (Pub. L. 117-328), the No TikTok on Government Devices Act, and its implementing guidance under Office of Management and Budget (OMB) Memorandum M-23-13, dated February 27, 2023, "No TikTok on Government Devices" Implementation Guidance, collectively prohibit the presence or use of a covered application on executive agency information technology, including certain equipment used by Federal contractors. The Contractor is prohibited from having or using a covered application on any information technology owned or managed by the Government, or on any information technology used or provided by the Contractor under this contract, including equipment provided by the Contractor's employees; however, this prohibition does not apply if the Contracting Officer provides written notification to the Contractor that an exception has been granted in accordance with OMB Memorandum M-23-13.

(c) Subcontracts. The Contractor shall insert the substance of this clause, including this paragraph (c), in all subcontracts, including subcontracts for the acquisition of commercial products or commercial services.

(End of clause)

8 ATTACHMENT D: Evidence of Responsibility Certification

Please download and complete the attachment listed with this RFP posting.

9 ATTACHMENT E: Subcontractor Questionnaire

Please download and complete the attachment listed with this RFP posting.

10 ATTACHMENT F: Budget template

Please download and complete the attachment listed with this RFP posting.