



Request for Proposal 2020-061

Developing a leading-edge learning approach for global health audiences

I. Summary of Deadlines

Release request for proposal	November 3, 2020
Confirmation of interest	November 5, 2020
Fact-finding questions	November 5, 2020
Answers to respondent questions	November 6, 2020
Proposals due	November 11, 2020
Interviews with short-listed suppliers	November 16, 2020
Notification of decision	November 16, 2020
Project start date	December 2, 2020

Note that PATH reserves the right to modify this schedule as needed. All parties will be notified simultaneously by email of any changes.

II. PATH Statement of Business

PATH is a global organization that works to accelerate health equity by bringing together public institutions, businesses, social enterprises, and investors to solve the world’s most pressing health challenges. With expertise in science, health, economics, technology, advocacy, and dozens of other specialties, PATH develops and scales solutions—including vaccines, drugs, devices, diagnostics, and innovative approaches to strengthening health systems worldwide.

Headquartered in Seattle, Washington, PATH has 39 offices in 22 countries. PATH currently works in more than 70 countries in the areas of health technologies, maternal and child health, reproductive health, vaccines and immunization, and emerging and epidemic diseases. For more information, please visit www.path.org.

III. Project Background and Purpose

A. Project Background: Instructor-led, in-person training models are increasingly untenable given COVID-19 restrictions, travel costs and environmental impact, and localization considerations. Virtual training models relying solely on web-based slide presentations can be ineffective if they don't rely on proven adult-learning principles and aren't offered along with adequate follow-up and post-training engagement.

PATH is seeking to develop a leading-edge, behavior-changing, user-driven, blended learning approach built on evidence-based adult learning principles that can be implemented globally for audiences ranging from national policy makers to healthcare workers in a range of connectivity and bandwidth settings, and with varied technical skills and expertise.

We want to develop courses that move beyond 'narrated slide shows' to include games, facilitated peer-to-peer dialogues, interactive assessments, scenario-based activities, simulations, and supported follow-up. Depending on the need and audience, we may also consider frontier mixed reality training technologies.

Developing and documenting this learning approach will allow PATH to combine its wealth of existing content and technical expertise with instructional design know-how to create engaging, interactive, adaptable, and localized and localizable training courses that can be delivered by PATH facilitators and platforms to audiences around the world via accessible channels resulting in more sustained learning and behavior change.

B. RFP Purpose: PATH is looking for an organization with expertise in learning consultation/engineering, solution architecture, instructional design, as well as copy editing and localization capabilities to help us develop this user-centered virtual global training approach including:

- Converting existing instructor-led and/or basic virtual training into more advanced blended and/or virtual learning modules built to meet unique needs of global users by leveraging adult learning principles and frontier training technologies.
- Documenting the conversion process so it can be replicated for new or other existing training content.
- Identifying and documenting the user needs and requirements for appropriate, accessible platforms for community knowledge management, learning, and sharing.
- Documenting how to measure short- and longer-term impact of PATH's updated training approach on knowledge uptake and sustained behavior change.
- Training PATH staff to be effective in using PATH's updated training approach.

IV. Scope of Work and Deliverables

A. Scope of Work: The selected organization will work with PATH subject-matter experts, implementers, and evaluators to develop and document a leading-edge, behavior-changing, user-driven, blended learning approach built on evidence-based adult learning principles that can be implemented globally for audiences ranging from national policy makers to healthcare workers. This approach will include the identification of learning platform requirements and specific learning platforms most appropriate for each use case and audience.

This organization will also help PATH apply this learning approach through the development of 2 to 3 modules which can be tested and used as prototypes for additional conversions—each with a different target audience consideration. Proposed content areas, specifications, and additional resources are detailed below.

Content	Unique Specifications/Considerations for Prototype Modules	Additional Resources
Client counseling on self-injection of the contraceptive DMPA-SC combining two existing lessons	<ul style="list-style-type: none"> • Mobile friendly • Enable user login without email address • Integrate virtual/in-person follow-up 	<ul style="list-style-type: none"> • Health worker training Lesson 5 and Lesson 10 • Related materials • Related article
Introducing visual analytics	<ul style="list-style-type: none"> • Ability to be accessed through Health Insights Platform (currently under development leveraging Microsoft Community Training platform) 	
Introduction to policy advocacy	<ul style="list-style-type: none"> • Presented in English and French 	<ul style="list-style-type: none"> • Workshop Facilitator’s Guide • Related materials

General requirements for these module prototypes include:

- Incorporation of evidence-based adult learning principles.
- Prioritization of user needs, including support for daily activities (e.g., “guide on the side”).
- Allowing for rapid content localization.
- Supporting on-demand and scheduled training.
- Supporting ongoing mentoring and peer-to-peer engagement.
- Capturing content generated through community interaction for review and reuse.
- Suggesting other resources or modules that might be of interest to user given their unique learning journey.
- Developing multi-use templates for standardized learning assets

- Ability to use in low-bandwidth, offline, and disconnected settings and on a variety of device types and versions (desktop, laptop, tablet, smart phones—Android and iOS).
- Usable by audiences with varied education and technical expertise.
- Preference for open-source platforms.
- Ability to track participation, knowledge gain, and behavior change.

Additionally, presuming the learning approach and prototype modules are successful, we would also like this organization to:

- Develop an instructional design plan for converting the complete policy advocacy course and convert 3-5 additional modules.
- Develop an instructional design plan for converting the complete DMPA-SC course.

The selected organization must have previous experience developing technical training for virtual delivery to a global audience in low-bandwidth settings with limited connectivity. Further, the outputs must be developed and delivered in a way to allow for updates and varied branding.

B. Proposed deliverables timeline:

Project start date	December 2, 2020
Work plan to develop initial module prototypes (3), including requirements for community learning platform(s)	December 20, 2020
V1 module prototypes (3)	December 31, 2020
V2 module prototypes (3), including facilitation guidance for trainers Draft documentation of overall approach, including key steps and considerations in converting content and measuring impact	February 26, 2021
Final module prototypes (3), including facilitation guidance for trainers Final documentation of approach, including key steps and considerations in converting content and measuring impact	March 31, 2021
Work plan to convert content for additional modules based on prototypes	April 15, 2021
Additional modules (3-5) based on prototypes, including guidance for trainers Updated documentation of overall approach	June 15, 2021
End date	June 30, 2021

V. Proposal Requirements - Financial

Provide itemized costs for the total scope of this project, based on the scope of work and deliverables outlined in Section IV. The final scope of work may be subject to negotiation; however, bidder selection will be made against the original scope of work. Bids should include itemized costs for key elements of the scope of work, as follows:

- Percent participation in total level of effort according to key staff.
- Rates of key staff.
- Estimated total level of effort and associated costs.
- Estimated schedule of other anticipated expenses (travel, subcontracted resources, supplies, outside resources, etc.).

PATH's available budget for this scope of work is up to \$60,000. Note that this figure is an estimate provided for informational purposes to the applicants and is not binding. PATH staff will provide subject-matter expertise, supply complete instructor-led and/or basic virtual training content, and be responsible for delivery and evaluation of finished training modules.

Special Note on Indirect costs

Indirect costs are overhead expenses incurred as a result of the project but not easily identified with the project's activities. These are administrative expenses that are related to overall general operations and are shared among projects and/or functions. Examples include executive oversight, existing facilities costs, accounting, grants management, legal expenses, utilities, and technology support.

Indirect rate allowances: These rates are maximum allowances. If the organization has lower rates, the lower rates should be used. To the extent that indirect costs are applicable, they are subject to the following limits:

- *Up to 10% for US universities and other academic institutions.*
- *Up to 15% for non-US academic institutions, and all private, voluntary, and nongovernmental organizations, regardless of location.*
- *No indirect costs will be paid to US Government agencies, other private foundations, and for-profit organizations.*
- *Rates apply both to the primary grantee, subgrantees, and subcontracts that are part of the proposal.*

Please note, in so far as possible, identifiable (allocable) costs should be documented and justified in the proposal as direct costs, including those for dedicated ongoing project management and support. Newly acquired facilities costs that can be allocable to the project are acceptable as direct costs.

VI. Proposal Requirements – Technical

Provide a narrative on your technical approach to accomplish the Scope of Work and Deliverables per section IV, including:

- Description of technical approach.
- Discussion of project management and roles of project team.
- Timeline to meet the deliverables.
- Potential obstacles and plan to overcome them.
- Identification of major internal and external resources.

Provide information on your overall qualifications, including:

- Profile of relevant corporate qualifications.
- Profile of relevant experience and examples of related work.
- Qualifications of key members of the proposed project team (attach CVs and provide details of back-up/standby teams).
- Number of years in business.
- If your company has more than one location, please indicate these qualifications for the site that is responding.

VII. Proposal Evaluation Criteria

The following is a list of significant criteria against which proposals will be assessed. The criteria are listed in order of priority; however, they are not weighted.

- A. Technical (as detailed in Section VI).
- B. Costs (as detailed in Section V).
- C. Experience (as detailed in Section VI).

Note: PATH reserves the right to include additional criteria.

VIII. Instructions and Deadlines for Responding

A. PATH contacts

- Procurement contact: Jessica Nguyen, nguyen@path.org.
- Project contact: Michael Sheffield, msheffield@path.org.

B. Confirmation of interest

Please send a statement acknowledging receipt of this solicitation and your intent to respond or not respond no later than November 5, 2020. Send the confirmation to the contacts listed above.

C. Fact-finding questions

Questions on this solicitation will be accepted via email to the contacts listed above through November 5, 2020. Answers to submitted questions will be provided to all participants who confirmed interest per Section VIII.B through November 6, 2020. Please note that responses will **not** be confidential except in cases in which proprietary information is involved. Inquiries after this date cannot be accommodated.

D. Proposals due: November 11, 2020

Completed proposals should be submitted by email to the contacts listed above. The subject line of the email should read: **RFP 2020-061: Developing a leading-edge learning approach for global health audiences** <*your company name*>.

E. Selection of short-list and interviews

PATH reserves the right to select a shortlist from the bids received. PATH has the option to interview and discuss specific details with those candidates who are on the shortlist.

F. Conclusion of process

Applicants will be notified of PATH's decision by **November 16, 2020**. Final award is subject to the terms and conditions included in this solicitation, as well as successful final negotiations of all applicable terms and conditions affecting this work.

IX. Terms and Conditions of the Solicitation

A. Notice of non-binding solicitation

PATH reserves the right to reject any and all bids received in response to this solicitation and is in no way bound to accept any proposal.

B. Confidentiality

All information provided by PATH as part of this solicitation must be treated as confidential. In the event that any information is inappropriately released, PATH will seek appropriate remedies as allowed. Proposals, discussions, and all information received in response to this solicitation will be held as strictly confidential, except as otherwise noted.

C. Conflict of interest disclosure

Suppliers bidding on PATH business must disclose, to the procurement contact listed in the RFP, any actual or potential conflicts of interest. Conflicts of interest could be present if; there is a personal relationship with a PATH staff member that constitutes a significant financial interest, board memberships, other employment, and ownership or rights in intellectual property that may be in conflict with the supplier's obligations to PATH. Suppliers and PATH are protected when actual or perceived conflicts of interest are disclosed. When necessary, PATH will create a management plan that provides mitigation of potential risks presented by the disclosed conflict of interest.

D. Communication

All communications regarding this solicitation shall be directed to appropriate parties at PATH indicated in Section VIII. A. Contacting third parties involved in the project, the review panel, or any other party may be considered a conflict of interest and could result in disqualification of the proposal.

E. Acceptance

Acceptance of a proposal does not imply acceptance of its terms and conditions. PATH reserves the option to negotiate on the final terms and conditions. We additionally reserve the right to negotiate the substance of the finalists' proposals, as well as the option of accepting partial components of a proposal if appropriate.

F. Right to final negotiations

PATH reserves the option to negotiate on the final costs and final scope of work and reserves the option to limit or include third parties at PATH's sole and full discretion in such negotiations.

G. Third-party limitations

PATH does not represent, warrant, or act as an agent for any third party as a result of this solicitation. This solicitation does not authorize any third party to bind or commit PATH in any way without our express written consent.

H. Proposal Validity

Proposals submitted under this request shall be valid for 90 days from the date the proposal is due. The validity period shall be stated in the proposal submitted to PATH.