REQUEST FOR PROPOSAL

#### The University of Texas Health Science Center at Houston

#### RFP No. 744-R1511 - BEECH Professional Development eLearning Course Redesign

Pre-proposal Conference: January 30, 2015, 11:00 AM CST

Bid Submittal Deadline: February 25, 2015, 11:00 AM CST

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**SPECIFICATIONS AND ADDITIONAL QUESTIONS**

**5.1 General**

The minimum requirements and the specifications for the Services, as well as certain requests for information to be provided by Proposer as part of its proposal, are set forth below. As indicated in **Section 2.3** of this RFP, the successful Proposer is referred to as the “**Contractor**.”

**The Proposer may request and receive a time-limited username and password offering access to the current BEECH system to assist the Proposer in adequately preparing its proposal.** Such access may be requested by submitting an email to the University Contact containing the following information:

* Proposer’s company name
* Requester’s first and last name
* Requester’s email address

Goals

* Generate an attractive, interactive and responsive re-design of the current BEECH eLearning course implementation that will be hosted within a Moodle 2.7.x Learning Management System (LMS) / Learning Content Management System (LCMS) in accordance with the UTHealth Graphic and Editorial Standards (ref. **Exhibit A**)
* Improve and optimize the eLearning course experience, navigation and flow for those enrolled in the BEECH certification course.
* Improve registration process for the English- and Spanish-language BEECH sites
* Replace old video clips with updated video clips.
* Revise the current BEECH eLearning course Help Features.

Objectives

Objective 1: Improve the overall look of the English- and Spanish-language BEECH sites, bringing it up-to-par with other learning management systems.

* Replace all photos with hand-drawn pictures or photos that CLI will provide.
* Improve text readability.
  + - Bulleted text on page should flow better with photo/picture on page.
    - Font sizes should better match the importance of the text.
    - Horizontal scrolling should be deleted.
* Improve layout and design of pages.

Objective 2: Improve usability of the English- and Spanish-language BEECH sites

* Improve linear progression in each session, and between sessions and modules
  + - Allow users to click “Next” to get to the Test Your Knowledge section of each session from the end of the Learn section.
    - Inform users of their completion of a session
    - Link users to the supplemental Treasure Chest section of each session
* Automate certificates of completion for each session
* Build a better Help function for users
* Highlight the email address, toll-free number, and FAQs to better assist users
* Once a Module is completed, the next Module needs to be unlocked and available to the user automatically

Objective 3: Improve registration process for the English- and Spanish-language BEECH sites

* Registration that captures users’ demographic information before they enroll in the course, and updates the information before each module

Objective 4: Update video footage for the English- and Spanish-language BEECH sites

* Replace approximately 90% of the video clips on the English BEECH site with video clips that CLI provides
* Replace approximately 60% of the video clips on the Spanish BEECH site with video clips that CLI provides

Current Course Assets (BEECH English- and Spanish-language sites)

* 4 modules with 5 sessions in each module
* 1 orientation session
* 21 sessions total per site: (4 Modules) x (5 Sessions) + (1 Orientation Session)
* Approx. 180 video clips on each BEECH site
* Total Run Time (TRT) for each video clip: approx. 30 seconds to 1 minute, 30 seconds
* Approx. 600 webpages per site that include audio files, images, text, video, PDFs, and quizzes.

Note: Contractor will receive access to assets listed above.

**5.2 Minimum Qualification Requirements**

Each Proposal must include information that clearly indicates that Proposer meets each of the following minimum qualification requirements:

* + 1. A minimum of four (4) years’ professional experience in eLearning course design as well as website design and development
    2. Knowledge of current industry eLearning course and web standards
    3. Advanced knowledge (i.e. developer/programmer) of Moodle LMS

NOTE: Attestation to these minimum qualifications is required in the Additional Questions Specific to this RFP in Section 5.4.1.

**5.3 Scope of Work**

**Kickoff Meeting**

1. Face-to-face meeting with UTHealth staff to define:

* Project goals and expectations
* Roles of UTHealth staff and Contractor staff
* Project schedule
* Plan for user acceptance testing
* Plan for change control process
* Plan for risk management
* Outline anticipated risks and responses
* Project reporting and methods for answering Contractor questions
* Confirmation of business requirements
* Open questions on system from Contractor
* Contractor shall submit documentation in the form of a report to detail the kickoff meeting discussions. In addition to documenting the results of the kickoff meeting, the report shall include any changes or supplements to the previously provided business requirements as a result of the kickoff meeting.

**Design**

* Improve Registration process for the English- and Spanish-language BEECH sites, including Registration that captures users’ demographic information before they enroll in the course, and updates the information before each module.
* Present at least two (2) preliminary design concepts. One (1) concept will be chosen by University for template designs.
* Assist and make recommendations on gathering design assets (logos, illustrations, photos, videos, color palettes and fonts) to incorporate in the finalized template designs.
* Make recommendations on course design including but not limited to navigation and structure based on current industry analytics, eLearning course, and web standards.
* Design eLearning course homepage template and subpage templates.
* Design eLearning course templates for each course module following the same design theme as the homepage template.
* Incorporate quick access links or buttons to CLI Engage eLearning Platform services such as Public Page Examples, About Us, FAQ, Contact Us wherever appropriate to the design concept.
* Apply University and State required standards for usability, accessibility and brand standards (**ref. Exhibit A**).

**Building and Delivery**

1. Build front end code for all finalized template designs utilizing customized responsive web design methods that will work within the Moodle 2.7.x LMS/LCMS.
2. The front end code may be based off of a modified responsive Moodle Essentials Theme.
3. Assist the CLI Engage eLearning Team with integration into the Moodle 7.2.x LMS/LCMS.
4. Provide an inventory of all style elements used in the templates—fonts, color palettes, pixel measurements, etc.
5. Assist in testing once all templates are integrated into the Moodle 7.2.x LMS/LCMS.
6. **Creation and installation of application on UTHealth Testing Server(s)**

The Contractor will build and install the system on the UTHealth testing servers. During this period the Contractor will collaborate with UTHealth IT staff to coordinate the installation process.

1. **User Acceptance Testing (UAT) of test system**

The Contractor and project sponsor will conduct UAT testing of the system. The sponsor will provide feedback on the functioning of the system and the Contractor will make corrections and modifications as needed within the defined project scope. The change control process will manage potentially out of scope tasks. The Contractor and sponsor will agree upon a specific number of iterations of testing.

1. **Security scan of system on testing server(s).**

The project sponsor will collaborate with the UTHealth Security Team to conduct security scans using the QualysGuard scanning software. Contractors will mitigate any security risks identified by the scanning software. The scanning and mitigation will continue until the application reaches an acceptable level of risk as agreed upon by the UTHealth Security Team and project sponsors. This scan includes any and all Development / Testing / Staging and Production Servers.

1. **Accessibility scan of system on testing server(s).**

The project sponsor will collaborate with the UTHealth Web Communications Department to conduct Accessibility Scans using the Firefox WCAG Contrast Checker Add-on and the WebAIM WAVE Toolbar. Contractor will mitigate any accessibility issues identified by the software. The scanning and remediation will continue until the application reaches the level of accessibility as identified by UTHealth Web Communications Department guidelines.

1. **Installation of application on UTHealth production server(s).**

The Contractor will install the application on the UTHealth production severs. This installation may include collaborating with the UTHealth Identity Management team in the integration of the application with the UTHealth Access Manager hardware for purposes of receiving authentication entitlement strings from the Access Manager appliance upon authentication from a 3rd party identity provider.

1. **User Acceptance Testing (UAT) of production system.**

The Contractor and project sponsor will conduct a UAT testing of the system. The sponsor will provide feedback on the functioning of the system, and the Contractor will make corrections and modifications as needed within the defined project scope. The change control process will manage potentially out of scope tasks. Any changes to the source code that requires a change in the business logic or adding additional fields will require another security scan in the testing site before implementation in the production site.

**DELIVERABLES**

Deliverable 1: Kick off meeting report

Deliverable 2: Registration Process Mockup and 2 preliminary design concepts

Deliverable 3: Delivery of Orientation and Module 1 with 5 Sessions (see **Section**

**5.1** to ensure the goals and objectives are met for both the English

and Spanish sites)

Deliverable 4: Delivery of Module 2 with 5 Sessions (see **Section 5.1** to ensure the

goals and objectives are met for both the English and Spanish sites)

Deliverable 5: Delivery of Module 3 with 5 Sessions (see **Section 5.1** to ensure the

goals and objectives are met for both the English and Spanish sites)

Deliverable 6: Delivery of Module 4 with 5 Sessions (see **Section 5.1** to ensure the

goals and objectives are met for both the English and Spanish sites)

Deliverable 7: Application on UT Health testing server(s)

Deliverable 8: UAT of test system

Deliverable 9: Security scan of system on testing server(s)

Deliverable 10: Installation on UT Health production server(s)

Deliverable 11: Accessibility scan of system on production server(s)

Deliverable 12: Security scan of system on production server(s)

Deliverable 13: Maintenance for debugging approximately 60 days after delivery

**5.4 Additional Questions Specific to this RFP**

5.4.1 Please describe your company’s experience in eLearning course design, web design, and web development. Include the number of years’ experience you have in this area.

5.4.2 Please demonstrate your knowledge of current industry eLearning courses and web standards.

5.4.3 Please demonstrate your knowledge of Moodle LMS.

5.4.4 Provide at least five (5) examples of projects similar to the scope of work in this RFP that your company has successfully completed. Include your client’s name, approximate date range of project (month/year - month/year), a brief project description, and samples (such as screenshots or PDFs) of each project.

5.4.5 What experience does your company have working with universities and other educational organizations?

5.4.6 How many people from your company will work on this project? Please specify each person’s name, title, role in this project, and include his/her resume.

5.4.7 Can your company perform all services related to this project in-house including artistic assets such graphic design and photo and video integration,? If not, which specific portion of the project will be outsourced and to what specific company?

5.4.8 Provide a detailed project timeline with milestones. Include your recommended approval and acceptance processes for the project.

5.4.9 Describe any difficulties your company anticipates in performing the project and how your company plans to manage these difficulties. Include the assistance your company will require from University.

5.4.10 If your company takes exception to any terms or conditions set forth in the Agreement (ref. **APPENDIX TWO**), submit a list of the exceptions. NOTE: A GENERAL OBJECTION IS NOT AN ACCEPTABLE RESPONSE TO THIS QUESTION.

**IT Questions Specific to this RFP**

5.4.11 Proposer must indicate whether it will consent to include in the Agreement the “Access by Individuals with Disabilities” language that is set forth in **APPENDIX FIVE, Access by Individuals with Disabilities**. If Proposer objects to the inclusion of the “Access by Individuals with Disabilities” language in the Agreement, Proposer must, as part of its proposal, specifically identify and describe in detail all of the reasons for Proposer’s objection. NOTE: A GENERAL OBJECTION IS NOT AN ACCEPTABLE RESPONSE TO THIS QUESTION.

5.4.12 Proposer must respond to each item listed in **APPENDIX SIX, Electronic and Information Resources (“EIR”) Environment Specifications**. **APPENDIX SIX** will establish specifications, representations, warranties and agreements related to the EIR that Proposer is offering to provide to University. Responses to **APPENDIX SIX** will be incorporated into the Agreement and will be binding on Contractor.

5.4.13Proposer must respond to each item listed in **APPENDIX SEVEN, Security Characteristics and Functionality of Contractor’s Information Resources**. **APPENDIX SEVEN** will establish specifications, representations, warranties and agreements related to the EIR that Proposer is offering to provide to University. Responses to **APPENDIX SEVEN** will be incorporated into the Agreement and will be binding on Contractor.