

Request for Proposals

Data for Health: Instructional Design for Data Impact Virtual Training

Date Issued: October 20, 2020

Date Response Due: November 3, 2020

CDC FOUNDATION CONTACT
AMBER SLIGAR
PROGRAM OFFICER
ASLIGAR@CDCFOUNDATION.ORG

SUMMARY OF REQUEST

Through this Request for Proposals (RFP), the CDC Foundation is soliciting proposals from a Contracting entity/Contractor with expertise in instructional design, particularly in developing virtual training courses (e.g., adapting content for a virtual audience, content strategy, content editing and formatting, developing instructor guides for virtual learning, etc.). The Contracting entity/Contractor will revise or produce three virtual training courses focused on scientific communications. Each course should include PowerPoint presentations, activities for participants and corresponding instructor guides to guide delivery of the material.

BACKGROUND AND NEED

Less than half of all deaths around the world are registered with a cause of death, meaning that 29.4 million deaths go unrecorded each year, most in low- and middle-income countries. This lack of data means that many health policy decisions are made without adequate information. Bloomberg Philanthropies' Data for Health initiative (D4H) seeks to address this issue and works to improve public health data so that governments are equipped with the tools and systems to collect and use data to prioritize health challenges, develop policies, deploy resources and measure success. The Data Impact program collaborates with low- and middle-income country governments to expand the use of data to enhance public health policymaking.

The CDC Foundation, in collaboration with the CDC's Division of Global Health Protection, is developing and revising virtual trainings to continue Data Impact work in situations where in-country trainings are not feasible. The purpose of these courses is to provide D4H country participants with training in Scientific Communications and other skills related to the interpretation and translation of scientific information into formats shareable with the public through public health bulletins or publications in peer-reviewed journals. The remote learning modules will be utilized by participants in multiple countries in Asia and sub-Saharan Africa in a variety of roles including staff from Ministries of Health and National Public Health Institutes.

SCOPE

The CDC Foundation seeks proposals from experienced Contracting entities/Contractors to adapt and/or produce three virtual training courses focused on scientific communications. Each course should consist of PowerPoint presentations for each module of the training, accompanying instructor guides for each module, instructions for interactive learning activities to keep virtual trainees engaged and evaluation materials to assess the impact of the trainings. Meaningful and relevant learning activities such as polling questions, chat discussions, and mini presentations by participants, should be included to engage participants in the process of learning.

Project Description:

The CDC Foundation and CDC Division of Global Health Protection have subject matter expertise in the course topic areas and will provide relevant content to be included in the trainings. The following courses shall be adapted or developed:

1. Scientific Communications Training of Trainers (to be adapted from existing in-person training, outline attached as Appendix A)
2. Scientific Communications Participant Training (to be adapted from existing in-person training, outline attached as Appendix B)

- Public Health Bulletin Scientific Writing Workshop (to be developed from existing outline, attached as Appendix C)

The following terms are used to define the elements of each virtual training course:

Component	Description
Level 1. Course	A series of modules that cover the breadth of a particular subject.
Level 2. Modules	Content areas that collectively make up a course. This includes all learning activities and materials, which are tools that facilitate the learning process of various concepts, and help the learner achieve the objectives of the module, and overall course of study. Modalities will vary from module to module.
Level 2a. Instructor Guides	A comprehensive guide that maps out the process of how a module should be organized, taught and delivered to learners. For this project, the instructor guides will be used internally to guide course instructors; they are not intended for participants.
Level 2b. Learning Activities	Activities that facilitate the learning process of various concepts, and help the learner achieve the objectives of the module, and overall course of study. Learning activities can include knowledge checks, polls, case studies, accessing resource links, reading handouts, mini presentations by participants, chat discussions etc.
Toolkits	Some modules may include a toolkit, an organized “how-to” guide for components covered in that module.

Project Tasks:

- Project Kick-off Meeting.** The Contractor shall conduct a virtual kick-off meeting with the Project Team (CDC and the CDC Foundation) to review project tasks, timeline and plan for the project. The Contractor shall prepare a memo summarizing notes and actions items to the Project Team.
- Timeline/Work Plan.** The Contractor shall prepare a detailed timeline and work plan for accomplishing the remaining tasks of the contract, incorporating input from the kick-off meeting. The Contractor shall first submit a draft timeline and work plan for review by the CDC Foundation following the kick-off meeting.
- Project Coordination and Communication.** The Contractor shall assign a project lead to serve as the primary point of contact for coordination of the project and execution of deliverables. The Contractor shall provide contact information and bios for all personnel assigned to project.
- Planning, Development and Finalization of Courses.** The Contractor shall implement the approved work plan to adapt and develop the three virtual training courses. The Contractor shall assist in developing the content strategy, content editing, formatting and design of the courses, in collaboration with the Project Team. Below are expected products to be developed:
 - PowerPoint presentation files for each course module (approximately 31 modules across three courses, 26 existing to be reviewed and formatted, 5 to be created by Contractor using content provided by the Project Team) with consistent layout and formatting;
 - Instructor guides for each course and module (approximately 31 guides for modules across three courses, 8 existing to be reviewed and formatted, 23 to be created by Contractor using content provided by the Project Team) with consistent layout and formatting;

3. Suggestions for modifications to course formats including learning activities specifically designed to engage virtual learners (courses will most likely be taught via Zoom, but activities that are adaptable to multiple platforms are preferred);
4. Where appropriate, supplemental toolkits for optimal virtual learning; and
5. Evaluation tools for each of the three courses to gather insights and assess knowledge gained from course participants (an additional evaluation guide for pilot testing is requested for the Public Health Bulletin Scientific Writing Workshop, which will be pilot tested with public health bulletin editors in at least two countries).

ADDITIONAL RESOURCES

More information about the Data for Health Initiative and the Data Impact program:

- <https://www.d4hdataimpact.org/>
- <https://www.bloomberg.org/program/public-health/data-health/>
- <https://www.cdc.gov/globalhealth/healthprotection/data.html>
- <https://www.cdcfoundation.org/blog/better-health-through-better-data-sharing-results-data-impact-program>

PROPOSAL AND BUDGET REQUIREMENTS

Technical Requirements:

The produced virtual training courses shall have the following technical requirements:

- Materials will be developed in English but comprehensible for participants that do not speak English as a first language.
- Presentations and workshop materials will include a complete narrative appropriate for low- and middle-income country participants (i.e., materials and methods should not assume reliable internet access), and scripted notes for facilitators. Notes should also include resources and references used to develop the materials.
- Facilitator guides will describe the daily learning goals and include assessment strategies so the facilitator can quickly gauge daily progress.
- Materials will be provided in both an editable format, for country adaptation, and in a final format.
- Materials will be designed and packaged in compliance with CDC clearance requirements, including 508 compliance.
- When appropriate, materials will include open source supplemental tools including editable pdfs, mobile responsive digital tools or instructor-created tools to help with various aspects of activities and deliverables; examples include formulas for calculating statistical summaries, templates for summary reports, data visualization, short videos demonstrating various concepts, and instructional sites for in-depth learning.

Proposal Requirements:

Proposals should be submitted by email to the CDC Foundation. Proposals should be no more than 5 pages, single spaced, 11-point font, not including appendices, and should address the following:

1. The agency's proposed approach to each of the tasks outlined in the scope of work.
2. Appendices:
 - a. Projected budget for each task, broken down by labor hours, labor rate, and item costs where possible;

- b. Examples of previous work to develop and implement similar projects;
- c. Team structure, including a description of how senior members will be involved, primary point-of-contact, and tasks of each team member; and
- d. Brief bios of team members.

Budget Requirements:

Provide a detailed budget with narrative for all anticipated costs that represent the total project fees and may include management, administrative, design, development, subcontractor, production, printing costs and indirect costs. Proposals should strive to build operating costs into direct costs and minimize indirect costs to no more than 8 percent. The indirect is capped to maximize funds available for direct program costs. Please note that the CDC Foundation is an independent 501(c)(3) organization and is not subject to federally negotiated indirect rates.

Applicant Requirements:

To be considered, applicants should not have any affiliation with or received support from the tobacco industry or its associates in the past five years.

Key Contact: Send email inquiries and proposals to **Amber Sligar** at asligar@cdcfoundation.org.

TIMELINE

	Project Phase/Task	Deliverable	Due Date
1	RFP Phase	<ul style="list-style-type: none"> • RFP issued 	October 20, 2020
2	RFP Phase	<ul style="list-style-type: none"> • Proposals due to the CDC Foundation 	November 3, 2020
3	Contractor selection	<ul style="list-style-type: none"> • Selection of Contractor and initiation of contract 	November 10, 2020
4	Project Kick-off Meeting	<ul style="list-style-type: none"> • Planning meeting with Contractor, CDC and the CDC Foundation • Memo summarizing notes and actions items submitted by Contractor to the CDC Foundation 	Within the first week after contract is awarded
5	Timeline/Work Plan	<ul style="list-style-type: none"> • Draft of timeline and work plan • Finalized timeline and work plan 	1 week from project kick-off meeting 2 weeks from project kick-off meeting
6	Final Product Delivery	<ul style="list-style-type: none"> • Three complete courses with corresponding guides delivered with edits addressed ready for online implementation 	January 31, 2021

APPENDICES

Appendix A. Scientific Communications Training of Trainers Outline

Appendix B. Scientific Communications Course Outline

Appendix C. Public Health Bulletin Scientific Writing Workshop Draft Outline

Appendix A: Scientific Communications Training of Trainers Course Outline

Goal

To train Scientific Communications (SC) mentors how to effectively deliver the SC course and mentor participants to produce manuscripts and posters for publications or presentations.

Participants

Country partners identify mentors, who are often staff members from the Ministry of Health or other scientific government agencies with experience in producing publications and presentations. These mentors will work with participants during the SC course and in the weeks and months after the training to develop their products.

Facilitator

The Training of Trainers is led by the CDC technical lead for Scientific Communications.

Course Format

The course has traditionally been taught in person over the course of 5 days. The training is made up of several modules that review the basics of training and mentoring as well as the content of the SC course. Following the training, mentors are prepared to lead the SC course and guide their mentees to produce complete manuscripts and/or poster presentations.

Changes in this approach may be required as the course is adapted for online learning. Recommendations for this mode of these changes are requested.

Course Modules

- **Foundations of Adult Learning**
- **Mentoring and Coaching**
- **First Meeting**
- **Editing and Proofreading**
- **Instructional Strategies**
- **Challenging Behavior**

Appendix B: Scientific Communications Course Outline

Goal

To train participants in how to effectively communicate scientific information in a variety of formats to varied audiences.

Participants

Country partners identify participants, who are often staff members from the Ministry of Health or other scientific government agencies, fellowship program participants or scientific researchers. Ideally, participants will have a topic in mind prior to the course that they will develop into a manuscript or poster for publication or presentation.

Facilitators and Mentors

Sessions will be facilitated by the mentors trained previously in the Training of Trainers course. It is recommended that the participants are assigned mentors to guide them as they develop their manuscripts and posters. Some of the newly trained mentor-facilitators may have limited previous experience facilitating trainings.

Course Format

The course has traditionally been taught in person over the course of 2 weeks with facilitator-led presentations for four hours in the morning and workshop-style mentoring and independent work time for 4 hours each afternoon. There are 8 standard modules and 7 additional optional modules that can be selected for inclusion by country partners. Ideally, course participants will complete the course with a draft abstract and work with mentors in the weeks and months following the training to develop manuscripts or posters for submission to journals or conferences.

Changes in this format are expected as the course is adapted for online learning. Recommendations for this mode of these changes are requested.

Standard Course Modules

Module 1: Communicating scientific information: Attributes and principles of scientific communication

Module 2: Writing effectively: Communicating science effectively using plain language principles; using correct words, and crafting sentences and paragraphs

Module 3: Writing manuscripts: Types of scientific manuscripts (analytic and descriptive); components of a scientific manuscripts (IMRAD)

Module 4: Writing abstracts: Abstract writing and analysis; ancillary materials (how to write a title, etc.)

Module 5: Publishing manuscripts: Literature review (search engines and databases); plagiarism; journal selection; submission process

Module 6: Data visualization: Qualitative and quantitative data; effective visual display of data

Module 7: Communicating data effectively: Telling a story using data; communicating data to non-scientists

Module 8: The editing process: Understand the editing process; different levels of editing

Additional Modules that can be interchanged within the above list for country customization

- **Writing persuasive messages:** Types of messages (persuasive and informative)
- **Creating effective posters:** The principles of poster design
- **Creating effective slides:** The principles of slide design
- **Delivering effective presentations:** The principles of oral presentations; creating an “elevator speech”; handling questions and answers at conferences
- **Writing for social media:** The do’s and don’ts of social media message creation
- **Writing press releases:** Engaging with the media; writing a press release
- **Communication with infographics:** Presenting data visually using infographics

Appendix C: Public Health Bulletin Scientific Writing Workshop Outline

Goal

To support and encourage Ministry of Health (MOH) staff to analyze surveillance data using descriptive epidemiological methods and write epidemiological reports for publication in their national public health bulletin (PHB). After returning to their workplace, participants will feel empowered to analyze their data and publish their findings in the PHB. Success will be measured by the number of articles published by staff of regional and district health management teams.

Participants

The national PHB team will be responsible for selecting workshop participants. Targeted participants can be district, regional, and national level MOH staff responsible for collecting, analyzing, and reporting disease surveillance or civil registries data; conducting research in the health sciences; and/or carrying out epidemiological field investigations. Participants may also include representatives of academia, research institutions, and non-governmental organizations that are partnering with the MOH. For any participant to successfully participate and complete the workshop, they must be responsible for collecting and analyzing public health data and have a draft article prior to the start of the workshop.

Facilitators and Mentors

Sessions will be facilitated by subject matter experts to be identified by the national PHB team. It is recommended that the participants are assigned mentors to guide them as they develop their article. It cannot be assumed that the subject matter experts are expert facilitators and mentors.

Workshop Format

The 5-week workshop format includes plenary presentations and group work via Zoom or a similar videotelephony provider and independent learning via the [Calibrated Peer Review \(CPR\)'s online training platform](#) (see workshop outline). Week 1 will consist of plenary sessions to review workshop content and introduce participants to the CPR platform. Participants will practice using the CPR platform by completing a familiarization exercise. Week 2 will feature 3-hour daily sessions of plenary presentations and group work. Weeks 3, 4, and 5 will feature independent learning via the CPR platform supplemented by plenary presentations to review learning objectives and outcomes. The format is designed to accommodate schedules of busy professionals. Participants will be expected to attend all sessions and complete all assignments.

The Workshop Outline includes a list of materials proposed or already developed for review and consideration by the instructional designer.

Workshop Outline

Week/ Day	Session Title	Session Objectives	Materials for consideration or to be developed ¹	Format	Facilitation Notes	Independent writing assignment (to be completed with assigned Mentors)
2 weeks prior to workshop	Course preparation	<ul style="list-style-type: none"> Build a foundation of knowledge to achieve Workshop objectives. Become familiar with Zoom functions 	<ol style="list-style-type: none"> Writing Surveillance Reports Guidebook CDC Style Guide - https://wwwnc.cdc.gov/eid/pdfs/StyleGuide.pdf Workshop outline Link to CPR tutorial - http://cpr.molsci.ucla.edu/Documents/CPR%20Assignment%20Tutorial.pdf Guidelines for using Zoom Principles in Epidemiology - https://www.cdc.gov/csels/dsepd/ss1978/index.html Participant list with contact information and titles 	PDF files of documents are circulated to all participants at least 2 weeks prior to the workshop	Encourage participants to review materials prior to workshop. These materials will serve as references throughout the workshop. Ask participants to prepare for an icebreaker during Week 1.	A requirement of each participant is a draft article prior to the workshop (e.g., surveillance report, field investigation)
Week 1 MON	Introduction to workshop and online training platforms – Part 1	<ul style="list-style-type: none"> Introduce Workshop objectives and format Become familiar with the CPR and Zoom platforms 	<ol style="list-style-type: none"> Icebreaker exercise that is related to content Presentation of goals and objectives of public health bulletin Workshop syllabus Presentation on introduction to CPR – MMWR Summary Box Link to CPR website 	Plenary presentations via Zoom	Icebreaker that introduces participants to Zoom platform; PowerPoint decks are presented by facilitators. Review CPR MMWR Summary Box assignment.	All participants must complete the CPR MMWR Summary Box assignment exercise by Week 1/THURSDAY
Week 1 FRI	Introduction to workshop and online training platforms – Part 2	<ul style="list-style-type: none"> Review results of CPR BLUF exercise 	<ol style="list-style-type: none"> Peer-to-peer connection activity Excel spreadsheet of CPR MMWR Summary Box exercise results 	Plenary discussions via Zoom	Plenary discussion of CPR exercise outcomes and challenges experienced.	Participants develop a Summary Box for their PHB article
Week 2 MON	Surveillance and Field Investigation Reports	<ul style="list-style-type: none"> Review the structures and elements of a surveillance report and a field investigation report 	<ol style="list-style-type: none"> Peer-to-peer connection activity Presentation on epidemiological reports Checklist of information to include in epidemiological reports 	Plenary presentation via Zoom	PowerPoint decks are presented by the facilitators.	Participants review and revise their PHB article to ensure it includes all the elements of an epidemiological report
Week 2 TUE	Keep it Simple Use the Style Guide	<ul style="list-style-type: none"> Review the elements of a writing style necessary for effective communication Develop a PHB article in plain language Know the importance of a style guide and why it must be adhered to 	<ol style="list-style-type: none"> Peer-to-peer connection activity CDC Style Guide - https://wwwnc.cdc.gov/eid/pdfs/StyleGuide.pdf Presentation “Writing in Plain Language” Further develop presentation to include style guide using CDC document 6S exercise and answers 	Plenary presentation and group work via Zoom	PowerPoint deck is presented by the facilitator. Participants break out into small groups to complete the 6S exercise. Group is reconvened to review results	Participants identify the scientific writing errors in their articles and revise and expand them based on lessons learned from the 6S exercise

¹ This list is not exhaustive – All available materials will be provided to the instructional designer

Week/ Day	Session Title	Session Objectives	Materials for consideration or to be developed ¹	Format	Facilitation Notes	Independent writing assignment (to be completed with assigned Mentors)
Week 2 WED	Types of Scientific Misconduct	<ul style="list-style-type: none"> Understand what is and how to avoid scientific misconduct 	<ol style="list-style-type: none"> Peer-to-peer connection activity Presentation "Scientific Misconduct" 	Group presentation via Zoom or Skype	PowerPoint deck is presented by the facilitator.	Participants review PHB article and ensure each concept, idea, etc. is referenced and presentation of data is appropriate
Week 2 THU	Literature Review	<ul style="list-style-type: none"> Understand why and how to perform a comprehensive literature review 	<ol style="list-style-type: none"> Peer-to-peer connection activity Presentation "Literature Review" Presentation on references 	Plenary presentation work via Zoom Group Work	PowerPoint deck is presented by the facilitator. Group work - provide the participant with introduction and method section of a paper. Group to conduct the literature review to support introduction and methods (Note: participants will need access to PubMed and articles).	Participants develop a literature review strategy for their PHB article
Week 3	Describing Data	<ul style="list-style-type: none"> Communicate results of data analysis 	<ol style="list-style-type: none"> CPR online training module Peer-to-peer connection activity 	CPR online training format	Participants complete module by Thursday of the week. Facilitator convenes participants on Friday to discuss experience and results.	Review and rewrite PHB article applying lessons learned
Week 4	Preparing Tables	<ul style="list-style-type: none"> Prepare tables for scientific reports 	<ol style="list-style-type: none"> CPR online training module Peer-to-peer connection activity 	CPR online training format	Participants complete module by Thursday of the week. Facilitator convenes participants on Friday to discuss experience and results.	Review and rewrite PHB article applying lessons learned
Week 5	Preparing Graphics	<ul style="list-style-type: none"> Prepare graphs for scientific reports 	<ol style="list-style-type: none"> CPR online training module Peer-to-peer connection activity 	CPR online training format	Participants complete module by Thursday of the week. Facilitator convenes participants on Friday to discuss experience and results.	Review and rewrite PHB article applying lessons learned
Week 5 FRI	The Small but Important Details	<ul style="list-style-type: none"> Develop titles and abstracts appropriate for a PHB article 	<ol style="list-style-type: none"> Presentation "Abstract title and acknowledgments" Wrap up presentation Course evaluation 	Plenary Presentation	PowerPoint deck is presented by the facilitator.	Participants review