



BOARD OF SUPERVISORS AGENDA ITEM REPORT AWARDS / CONTRACTS / GRANTS

☒ Award ☐ Contract ☐ Grant

Requested Board Meeting Date: 08/15/22

** = Mandatory, information must be provided*

or Procurement Director Award: ☐

***Contractor/Vendor Name/Grantor (DBA):**

PTG International, Inc. (Headquarters: Germantown, MD)

***Project Title/Description:**

E-Course Design and Development

***Purpose:**

Award: Master Agreement No. MA-PO-23-019. This Master Agreement is for an initial term of one (1) year in the initial award amount of \$490,000.00 (including sales tax) and includes four (4) one-year renewal options in the annual award of \$75,000.00. Administering Department: Health Department.

***Procurement Method:**

Pursuant to Pima County Procurement Code 11.12.020, Competitive sealed proposals, Solicitation No. RFP-PO-22-021 was conducted. Two (2) responses were received. Award is to the responsive and responsible respondent submitting the highest scoring proposal.

PRCUID: 445889

Attachments: Notice of Recommendation for Award and Master Agreement.

***Program Goals/Predicted Outcomes:**

The Pima County Health department recognizes the value of providing state-of-the-art training and educational opportunities to their staff to help them achieve their professional development goals. It is also incumbent on PCHD to provide the highest quality training to prepare staff to effectively deliver public health programs to the community. E-learning courses are engaging, interactive and designed to be self-paced, allowing staff to plan their learning time around the demands of delivering programs and services to the public. It is critically important to use the most effective e-learning design and development strategies so staff will gain the greatest benefit from each educational experience

***Public Benefit:**

Well-trained, well-prepared Health department employees are better able to effectively provide the public health services and programs needed by the Pima County community. By providing each division the opportunity to request custom-designed e-learning courses, staff will gain the knowledge and skills required for their position and are also able to achieve their own professional development goals.

***Metrics Available to Measure Performance:**

An evaluation at the end of each course will be required before staff are given credit for the course. The evaluation will rate course design, delivery method and clarity. There will also be an evaluation completed by each division rating their overall satisfaction with the vendor in areas such as responsiveness, meeting specifications and meeting deadlines.

***Retroactive:**

No.

To: COB 08-02-22⁽¹⁾

PGS: 72

Vers: 1

THE APPLICABLE SECTION(S) BELOW MUST BE COMPLETED

Click or tap the boxes to enter text. If not applicable, indicate "N/A". Make sure to complete mandatory (*) fields

Contract / Award Information

Document Type: MA Department Code: PO Contract Number (i.e., 15-123): 23-019
 Commencement Date: 8/15/22 Termination Date: 8/14/23 Prior Contract Number (Synergen/CMS): _____
☒ Expense Amount \$ 490,000.00 * ☐ Revenue Amount: \$ _____

***Funding Source(s) required: Workforce Development Grant**

Funding from General Fund? ☐ Yes ☒ No If Yes \$ _____ % 0

Contract is fully or partially funded with Federal Funds? ☒ Yes ☐ No

If Yes, is the Contract to a vendor or subrecipient? Vendor

Were insurance or indemnity clauses modified? ☐ Yes ☒ No
 If Yes, attach Risk's approval.

Vendor is using a Social Security Number? ☐ Yes ☒ No
 If Yes, attach the required form per Administrative Procedure 22-10.

Amendment / Revised Award Information

Document Type: _____ Department Code: _____ Contract Number (i.e., 15-123): _____

Amendment No.: _____ AMS Version No.: _____

Commencement Date: _____ New Termination Date: _____

Prior Contract No. (Synergen/CMS): _____

☐ Expense ☐ Revenue ☐ Increase ☐ Decrease

Amount This Amendment: \$ _____

Is there revenue included? ☐ Yes ☐ No If Yes \$ _____

***Funding Source(s) required: _____**

Funding from General Fund? ☐ Yes ☐ No If Yes \$ _____ % _____

Grant/Amendment Information (for grants acceptance and awards)

☐ Award ☐ Amendment

Document Type: _____ Department Code: _____ Grant Number (i.e., 15-123): _____

Commencement Date: _____ Termination Date: _____ Amendment Number: _____

☐ Match Amount: \$ _____ ☐ Revenue Amount: \$ _____

***All Funding Source(s) required: _____**

*Match funding from General Fund? ☐ Yes ☐ No If Yes \$ _____ % _____

*Match funding from other sources? ☐ Yes ☐ No If Yes \$ _____ % _____

*Funding Source: _____

*If Federal funds are received, is funding coming directly from the Federal government or passed through other organization(s)?

Contact: Brandon Morgan, Procurement Officer Brandon Morgan Digitally signed by Brandon Morgan Date: 2022.07.21 15:04:37 -07'00' Division Manager Ana Wilber Digitally signed by Ana Wilber Date: 2022.07.21 15:15:01 -07'00'
 Department: Procurement Director Terri Spencer Digitally signed by Terri Spencer Date: 2022.07.22 09:26:20 -07'00' Telephone: 520-724-9510

Department Director Signature: _____ Date: 7/25/22
 Deputy County Administrator Signature: _____ Date: 25 July 2022
 County Administrator Signature: _____ Date: 7/26/2022



NOTICE OF RECOMMENDATION FOR AWARD

Date of Issue: July 22, 2022

The Procurement Department hereby issues formal notice to respondents to Solicitation No. RFP-PO-2200021 for E-Course Design and Development that the following listed respondent will be recommended for award as indicated below. The award action is scheduled to be performed by the Board of Supervisors on or after Monday, August 15, 2022.

Award is recommended to the:
Highest scoring proposal

AWARDEE NAME
PTG International, Inc.

AWARD AMOUNT
\$490,000.00

OTHER RESPONDENTS
CPS HR Consulting

Issued by: Brandon Morgan, Procurement Officer
Telephone Number: 520-724-9510

This notice is in compliance with Pima County Procurement Code §11.12.020(C) and §11.20.010(C).

Copy to: Pima County SBE via e-mail at SBE@pima.gov.

A handwritten signature in black ink, appearing to be "A. Morgan", located in the bottom right corner of the page.



MASTER AGREEMENT

PIMA COUNTY, ARIZONA

THIS IS NOT AN ORDER - TRANSMISSION CONSTITUTES
CONTRACT EXECUTION

Master Agreement No: 23000000000000000019

MA Version: 1

Page: 1 of 2

Description: E-Course Design and Development

I S S U E R	<p>Pima County Procurement Department 150 W. Congress St. 5th Fl Tucson AZ 85701</p> <p>Issued By: BRANDON MORGAN Phone: 5207249510 Email: brandon.morgan@pima.gov</p>
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T E R M S	<p>Initiation Date: 08-15-2022 Expiration Date: 08-14-2023</p> <table><tr><td>NTE Amount:</td><td>\$490,000.00</td></tr><tr><td>Used Amount:</td><td>\$0.00</td></tr></table>	NTE Amount:	\$490,000.00	Used Amount:	\$0.00
NTE Amount:	\$490,000.00				
Used Amount:	\$0.00				

V E N D O R	<p>PTG International Inc 13227 Executive Park Terrace Germantown MD 20874</p> <p>Contact: Eugene de Ribeaux Phone: 240-449-8482 Email: ederibeaux@ptg-intl.com Terms: 0.00 % Days: 30</p>
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Shipping Method:	Vendor Method
Delivery Type:	
FOB:	FOB Dest, Freight Prepaid
Modification Reason This Master Agreement is for an initial term of one (1) year in the initial award amount of \$490,000.00 (including sales tax) and includes four (4) one-year renewal options in the annual award of \$75,000.00. Attachment: Offer Agreement.	

This Master Agreement incorporates the attached documents, and by reference all instructions, Standard Terms and Conditions, Special Terms and Conditions, and requirements that are included in or referenced by the solicitation documents used to establish this agreement. All transactions and conduct are required to conform to these documents.



MASTER AGREEMENT DETAILS

Line	Description					
1	Do Not Use					
	Service Contract Amt (Not-To-Exceed)			Service From	Service To	
	0.00					
2	E-Learning Course using Articulate Software; 30 min					
	Discount	UOM	Unit Price	Stock Code	VPN	MPN
	0.0000 %	EA	\$8,750.90			
3	E-Learning Course using Articulate Software; 60 min					
	Discount	UOM	Unit Price	Stock Code	VPN	MPN
	0.0000 %	EA	\$13,126.35			
4	E-Learning Course using Articulate Software; 15 min					
	Discount	UOM	Unit Price	Stock Code	VPN	MPN
	0.0000 %	EA	\$7,438.27			

OFFER AGREEMENT

1. PURPOSE

This contract establishes a system-generated form Master Agreement ("MA") for Contractor to provide Pima County ("County") with E-Course Design and Development on an "as required basis" by issue of Delivery Order ("DO") or Delivery Order Maximo ("DOM").

2. CONTRACT TERM, RENEWALS, EXTENSIONS and REVISIONS

The MA will document the commencement date of the contract, and will be for a one (1) year period with four (4) one-year renewal options that the parties may exercise as follows: County will issue contract extensions, renewals, or revisions to Contractor with a revised MA document. Contractor must object in writing to the proposed revisions, terms, conditions, scope modifications and/or specifications within ten (10) calendar days of issuance by County. If Contractor does not notify county of any objections within that timeframe, the revision(s) will be binding on the parties.

3. CONTRACTOR MINIMUM QUALIFICATIONS

Contractor certifies that it is competent, willing, and responsible for performing the services or providing the products in accordance with the requirements of this contract. Contractor certifies that it possesses all licenses required by applicable Agencies to satisfy the requirements of this contract. See **Exhibit B: Minimum Qualification Verification Form (1 Page)**.

Contractor will research the designated Issuing Agency requirements to perform the requested work; will list **currently active** license number(s), Description & Class for the required licenses; and agrees to maintain said license(s) for the term of the contract and to notify County within ten (10) business days of any change in license status.

4. PRODUCT OR SERVICE SPECIFICATIONS & SCOPE OF WORK

4.1. General Specifications

- Course design should address different learning styles such as auditory, visual, verbal, and kinesthetic.
- Contractor will work with Subject Matter Experts (SMEs) from PCHD divisions to develop content; contractor does not need to be a content SME.
- Ensure Section 508 compliance within the course, including color contrast, ratio compliance, focus/tab order, text styles, alternate text labeling, and PDFs of complete courses.
- Publish course for Sharable Content Object Reference Model (SCORM) compliance and Learning Management
- Must be able to upload courses to Learning Management System (LMS).
- Electronically deliver source files, to include all audio, images, course, and player files.
- This award is contingent upon agreement by the contractor to comply with existing and future guidance from the Pima County Health Department regarding control of the spread of COVID-19.
- Courses must be developed using Articulate software.
- Provide professional voice-over narration when requested.
- Include a mute option with closed captioning for any videos.
- Synchronize audio narration to animations in slides.
- Develop a main menu structure for ease of navigation.
- Incorporate any PCHD-provided videos, as appropriate, or recommend an alternative design element if video content is required but video is not compatible with design.
- Alternative software options available for project management in case PCHD cannot access the preferred software due to security firewalls, lack of interface ability with vendor software, or budget considerations.

4.2. Item Specifications

- *E-Learning Course using Articulate Software 15 Min*
- *E-Learning Course using Articulate Software 30 Min*
- *E-Learning Course using Articulate Software 60 Min*

4.3. Grant Conditions

As applicable, at no additional cost to County, Contractor agrees to comply with all requirements included in the attached **Exhibit E: Contract Provisions for Non-Federal Entity Contracts Under Federal Awards (2 pages)**.

5. OFFER ACCEPTANCE & ORDER RELEASES

County will accept offer(s) and execute this contract by issuing an MA (recurring requirements) to be effective on the document's date of issue without further action by either party. The MA will include the term of the contract.

Pursuant to the executed MA, County departments requiring the goods or services described herein will issue a DO or DOM to the Contractor. County will furnish the DO or DOM to Contractor via facsimile, e-mail or telephone. **If County gives the order verbally, the County Department issuing the order will transmit a confirming order document to Contractor within five (5) workdays of the date it gives the verbal order.**

Contractor must not supply materials or services that are not specified on the MA and are not documented or authorized by a DO or DOM at the time of provision. County accepts no responsibility for control of or payment for materials or services not documented by a County DO or DOM.

Contractor will establish, monitor, and manage an effective contract administration process that assures compliance with all requirements of this contract. In particular, Contractor will not provide goods or services in excess of the executed contract items, item quantity, item amount, or contract amount without prior written authorization by contract amendment that County has properly executed and issued. Any items Contractor provides in excess of those stated in the contract are at Contractor's own risk. Contractor will decline verbal requests to deliver items in excess of the contract and will report all such requests in writing to County's Procurement Department within one (1) workday of the request. The report must include the name of the requesting individual and the nature of the request.

6. ACCEPTANCE OF GOODS & SERVICES

The County Department designated on the issued order (DO) will accept goods and services only in accordance with this contract. Such acceptance is a prerequisite to the commencement of payment terms.

7. COMPENSATION & PAYMENT

The MA will establish the contractual Not-to-Exceed Amount ("NTE Amount"). The NTE Amount represents the funding appropriated by County for this contract and cannot be altered without amendment. **Contractor will not accept orders, or provide services or products that cumulatively exceed the contract amount.**

7.1. Unit Prices

Contractor's unit prices must include all incidentals and associated costs required to comply with and satisfy all requirements of this contract, which includes the Offer Agreement and the Standard Terms and Conditions. County will make no payments for items not in the contract and Contractor will not invoice them.

Quantities in this solicitation are estimates only. County may increase or decrease quantities and amounts. County makes no guarantee regarding actual orders for items or quantities during the term of the contract. County is not responsible for Contractor inventory or order commitment.

UNIT PRICES (Net 30-day Payment Terms)

ITEM #	ITEM NAME Items to include and satisfy all Solicitation & Offer Agreement requirements, General & Item Specifications	ESTIMATED ANNUAL USAGE QUANTITY	UOM	UNIT PRICE \$	EXTENDED AMOUNT \$
1	E-learning course using Articulate software; 30 min	50	Half-Hour	\$ 8,750.90	\$437,545
2	E-learning course using Articulate software; 60 min	See Note	Hour	\$13,126.35	See note
3	E-learning course using Articulate software; 15 min	See Note	Quarter-Hour	\$ 7,438.27	See note
FOB Destination/Unloaded; include cost of freight in unit price. Although County will pay taxes IF applicable, do NOT include sales tax in unit price.				TOTAL PROPOSED COST	\$437,545

*Note: 30 minutes is the expected length of most courses. If shorter or longer courses are requested, the EAU would remain the same – a total of 1,500 minutes of course time.

Unless the parties otherwise agree in writing, all pricing will be F.O.B. Destination & Freight Prepaid Not Billed ("F.O.B. Destination"). Contractor will deliver and unload products or services at the destination(s) that the delivery article of this contract or accepted Order indicates. The offered Unit Price must include all freight costs.

Although an order may not fully include State and City sales tax, County will pay such taxes as are **DIRECTLY** applicable to County and Contractor invoices such taxes as a separate line item. Contractor must not include such taxes in the item unit price.

7.2. Price Warranty and Trade-In Allowance

Contractor will give County the benefit of any price reduction before actual time of shipment. Parties may negotiate a fair and equitable trade-in allowance value for County surplus property to be applied through either a discounted purchase price or account credit. The trade-in value must be stated on a written price quote prior to County making a purchase, or on a credit memo invoice for a prior purchase. Trade-In property will be itemized on the quote or invoice by description, model/part number, quantity and guaranteed trade-in value. County will coordinate and document the delivery of surplus trade-in property to Contractor. Award of contract constitutes disposition authority to trade-in surplus property pursuant to Board of Supervisors' Policy D.29.11, Surplus Personal Property.

7.3. Price Escalation

All unit prices shall consider/provide for current economic and market conditions, and include compensation for Contractor to implement and actively conduct cost and price control. No additional compensation shall be paid to Contractor to reimburse efforts to implement and conduct cost and price controls. **Prices shall remain fixed for the initial contract term, after which Contractor may submit no more than one (1) written Price Escalation Request ("PER") per term.** The PER must be submitted not later than 90 days prior to the contract renewal date, and must clearly demonstrate justification for the increase in price, such as continued and significant changes in economic and/or market conditions justifying any requested price escalation. The PER must reference/cite any source materials used to form the basis of the proposed justification, but must not include historical information prior to the initial contract term. County will research Bureau of Labor Statistics (BLS) Producer Price Index (PPI) and/or other related indicators or sources, and conduct an analysis to determine 1) if the submitted justification and evidence are sufficient, 2) the requested price escalation is fair and reasonable, and 3) if approving the PER is in the County's best interest. County reserves the right to negotiate, accept or reject the PER, or terminate and re-solicit the contract.

7.4. Living Wage

All pricing will conform to Pima County's Living Wage Ordinance 2002-1 if applicable, including required annual adjustments of the wage.

7.5. Additional Items and/or Services

This following section is for items that Contractor did not list or price above but are within the scope of this contract. Contractor may provide these items under this contract. Contractor will submit Master Price List (MPL) documents, compact disc (CD) or USB flash drive and file names or identify website address, identifying all other items offered pursuant to this contract. The MPL or website address specifically designed for County must include the vendor's/manufacture's or retail price list and the discount percentage off utilized to get to include Discounted Unit Price being offered to County i.e. $\text{Manufacturer's List Price} - (\text{List price} \times \text{Discount } \%) = \text{Discounted Unit Price}$. The resulting Unit Prices must be of similar discount off List Prices for those items specifically included above. Item Unit Prices above will govern in case of conflict with the Master Price List.

The parties may negotiate and establish unit pricing in writing under the contract for items included in the scope of the contract that does not have previously listed unit pricing.

7.6. Standard Payment Term

Net (30), effective from the date of valid invoice document and does not commence until the later of 1) the receiving County Department receives goods or services into County's payment system or 2) County Financial Operations receives and verifies Contractor's invoice.

7.7. Optional Early Payment Discount Term

Pima County Administrative Procedure No. 22-35 Section 2.2.4 describes County's practice regarding discounts for early payment. Contractor offers the following discounts to those prices to be used for all orders issued pursuant to this contract. County will utilize the existing payment code that best matches that offered and does

not exceed the offered discount percentage. Payment days cannot be less than ten (10) calendar days. Contractor will submit valid invoice document consistent with the associated DO to County's Finance Department at least seven (7) calendar days prior to the date on which the discounted payment is due. If desired, for any order issued pursuant with this contract, Contractor may offer early payment discounts that exceed this Early Payment Discount.

Optional Early Payment Discount: N/A % if payment tendered within N/A Days as indicated above.

7.8. Invoicing

Contractor will submit Request(s) for Payment or Invoices to the location and entity identified by County's DO document.

All Invoice documents will reference County's DO number under which the services or products were ordered. Contractor must utilize the item description, precise unit price, and unit of measure included in County's order document for **ALL** Invoice line items. County may return invoices that include line items or unit prices that do not match those documented by County's order to Contractor unprocessed for correction.

Contractor will provide detailed documentation in support of payment requests, which should be consistent with and not exceed County's DO document. Contractor will bill County within one (1) month after the date on which Contractor's right to payment accrues ("Payment Accrual Date"), which, unless this contract specifically provides otherwise, is the date Contractor delivers goods, performs services or incurs costs. Invoices must assign each billed amount to an appropriate line item of County's order and document each Payment Accrual Date. County may refuse to pay any amount that Contractor bills in which does not conform to County's DO document. County will refuse to pay any amount that Contractor bills more than six (6) months after the Payment Accrual Date, pursuant to A.R.S. § 11-622(C).

8. VENDOR RECORD MAINTENANCE

Contractor must establish and maintain a complete Pima County Vendor record, which includes the provision of a properly completed and executed "Request for Taxpayer Identification Number and Certification" document (Form W-9). The record must be registered with a valid and monitored email address for Contractor. In the event of any change that renders the information on that record inaccurate Contractor must update the record within ten (10) calendar days of the change and prior to the submission of any invoice or request for payment.

9. DELIVERY

"On-Time" delivery is an essential part of the consideration that Contractor is to provide to County under the contract. Contractor will make delivery in accordance with the Standard Terms and Conditions and to the location(s) on the DO document.

10. TAXES, FEES, EXPENSES

Pursuant to IRS Publication 510, County is exempt from federal excise taxes for goods. County is subject to State and City sales tax. County will pay no separate charges for delivery, drayage, express, parcel post, packing, insurance, license fees, permits, costs of bonds, surcharges, or proposal preparation unless the contract expressly includes such charges and the solicitation documents itemize them.

11. OTHER DOCUMENTS

Contractor and County are entering into this contract have relied upon information provided or referenced by Pima County Solicitation No. RFP-PO-2200021 including the RFP, Offer Agreement, Standard Terms and Conditions, solicitation amendments, Contractor's proposal, documents submitted by Contractor or References to satisfy Minimum Qualifications and any other information and documents that Contractor has submitted in its response to County's solicitation. The Contract incorporates these documents as though set forth in full herein, to the extent not inconsistent with the provisions of this contract.

12. INSURANCE

The Insurance Requirements herein are minimum requirements for this contract and in no way limit the indemnity covenants contained in this contract. Contractor's insurance shall be placed with companies licensed in the State of Arizona and the insureds shall have an "A.M. Best" rating of not less than A- VII, unless otherwise approved by County. County in no way warrants that the minimum insurer rating is sufficient to protect Contractor from potential insurer insolvency.

12.1. Minimum Scope and Limits of Insurance

Contractor will procure and maintain at its own expense, until all contractual obligations have been discharged, the insurance coverage with limits of liability not less than stated below. County in no way warrants that the minimum insurance limits contained herein are sufficient to protect Contractor from liabilities that arise out of the performance of the work under this contract. If necessary, Contractor may obtain commercial umbrella or excess insurance to satisfy County's Insurance Requirements.

12.1.1. Commercial General Liability (CGL)

Occurrence Form with limits of \$2,000,000 Each Occurrence and \$2,000,000 General Aggregate. Policy shall include cover for liability arising from premises, operations, independent contractors, personal injury, bodily injury, property damage, broad form contractual liability coverage, personal and advertising injury and products – completed operations.

12.1.2. Business Automobile Liability

Bodily Injury and Property Damage for any owned, leased, hired, and/or non-owned automobiles assigned to or used in the performance of this contract with a Combined Single Limit (CSL) of \$1,000,000 Each Accident.

12.1.3. Workers' Compensation (WC) and Employers' Liability

Statutory requirements and benefits for Workers' Compensation. In Arizona, WC coverage is compulsory for employers of one or more employees. Employers' Liability coverage with limits of \$1,000,000 each accident and \$1,000,000 each person - disease.

12.1.4. Technology Errors and Omissions (E&O) Insurance

The Technology E&O coverage shall have minimum limits not less than 2,000,000 Each Claim and \$2,000,000 Annual Aggregate. Such insurance shall cover any, and all errors, omissions, or negligent acts in the delivery of products, services, and/or licensed programs under this contract. Coverage shall include or shall not exclude settlement and/or defense of claims involving intellectual property, including but not limited to patent or copyright infringement. In the event that the Technology E&O insurance required by this contract is written on a claims-made basis, Contractor shall warrant that continuous coverage will be maintained as outlined under "Additional Insurance Requirements – Claims-Made Coverage" section.

12.1.5. Network Security (Cyber)/Privacy Insurance

Coverage shall have minimum limits not less than \$2,000,000 Each Claim with a \$2,000,000 Annual Aggregate. Such insurance shall include, but not be limited to, coverage for third party claims and losses with respect to network risks (such as data breaches, unauthorized access or use, ID theft, theft of data) and invasion of privacy regardless of the type of media involved in the loss of private information, crisis management and identity theft response costs. This should also include breach notification costs, credit remediation and credit monitoring, defense and claims expenses, regulatory defense costs plus fines and penalties, cyber extortion, computer program and electronic data restoration expenses coverage (data asset protection), network business interruption, computer fraud coverage, and funds transfer loss. In the event that the Network Security and Privacy Liability insurance required by this contract is written on a claims-made basis, Contractor must warrant that either continuous coverage will be maintained as outlined under "Additional Insurance Requirements – Claims-Made Coverage" section, or an extended discovery period will be exercised for a period of two (2) years beginning at the time of work under this contract is completed.

12.2. Additional Insurance Requirements

The policies shall include, or be endorsed to include, as required by this contract, the following provisions:

12.2.1. Claims-Made Insurance Requirements

If any part of the Required Insurance is written on a claims-made basis, any policy retroactive date must precede the effective date of this contract, and Contractor must maintain such coverage for a period of not less than three (3) years following contract expiration, termination or cancellation.

12.2.2. Additional Insured Endorsement

The General Liability, Business Automobile, Technology E&O, Network Security & Privacy Liability policies must each be endorsed to include Pima County and all its related special districts, elected

officials, officers, agents, employees and volunteers (collectively "County and its Agents") as additional insureds with respect to vicarious liability arising out of the activities performed by or on behalf of the Contractor. The full policy limits and scope of protection must apply to County and its Agents as an additional insured, even if they exceed the Insurance Requirements.

12.2.3. Subrogation Endorsement

The General Liability, Business Automobile Liability, Workers' Compensation and Technology E&O Policies shall each contain a waiver of subrogation endorsement in favor of County, and its departments, districts, officials, agents, and employees for losses arising from work performed by or on behalf of the Contractor.

12.2.4. Primary Insurance Endorsement

Contractor's policies shall stipulate that the insurance afforded Contractor shall be primary and that any insurance carried by County, its agents, officials, or employees shall be excess and not contributory insurance. The Required Insurance policies may not obligate County to pay any portion of Contractor's deductible or Self Insurance Retention (SIR).

12.2.5. Insurance provided by Contractor shall not limit Contractor's liability assumed under the indemnification provisions of this Contract.

12.2.6. Subcontractors

Contractor must either (a) include all subcontractors as additional insureds under its Required Insurance policies, or (b) require each subcontractor to separately meet all Insurance Requirements and verify that each subcontractor has done so, Contractor must furnish, if requested by County, appropriate insurance certificates for each subcontractor. Contractor must obtain County's approval of any subcontractor request to modify the Insurance Requirements as to that subcontractor.

12.3. Notice of Cancellation

Each Required Insurance policy must provide, and certificates specify, that County will receive not less than thirty (30) days advance written notice of any policy cancellation, except 10-days prior notice is sufficient when the cancellation is for non-payment of a premium. Notice must be mailed, emailed, hand-delivered or sent via facsimile transmission to County's Contracting Representative, and must include the project or contract number and project description.

12.4. Verification of Coverage

Contractor shall furnish County with certificates of insurance (valid ACORD form or equivalent approved by County) as required by this contract. An authorized representative of the insurer shall sign the certificates. Each certificate must include:

- County's tracking number for this contract, which is shown on the first page of the contract, and a project description, in the body of the Certificate;
- A notation of policy deductibles or SIRs relating to the specific policy; and
- Certificates must specify that the appropriate policies are endorsed to include additional insured and subrogation waiver endorsements for County and its Agents. Note: Contractors for larger projects must provide actual copies of the additional insured and subrogation endorsements.

12.4.1. All certificates and endorsements, as required by this contract, are to be received and approved by County before, and be in effect not less than 15 days prior to, commencement of work. A renewal certificate must be provided to County not less than 15 days prior to the policy's expiration date to include actual copies of the additional insured and waiver of subrogation endorsements. Failure to maintain the insurance coverages or policies as required by this contract, or to provide evidence of renewal, is a material breach of contract.

12.4.2. All certificates required by this contract shall be sent directly to the appropriate County Department. The Certificate of Insurance shall include County's project or contract number and project description on the certificate. County may require complete copies of all insurance policies required by this contract at any time.

12.5. Approval and Modifications

County's Risk Manager may approve a modification of the Insurance Requirements without the necessity of a formal contract amendment, but the approval must be in writing. County's failure to obtain a required insurance certificate or endorsement, County's failure to object to a non-complying insurance certificate or endorsement, or County's receipt of any other information from the Contractor, its insurance broker(s) and/or insurer(s), do not constitute a waiver of any of the Insurance Requirements.

13. PERFORMANCE BOND

Not applicable to this contract.

ACKNOWLEDGEMENT OF SOLICITATION AMENDMENTS

Contractor acknowledges that it incorporates the following solicitation amendments in its offer and this contract:

Amendment #	Date	Amendment #	Date	Amendment #	Date
Amendment 01	6/9/2022				

14. SMALL BUSINESS ENTERPRISE (SBE) CERTIFICATION

Not applicable to this contract.

Is your firm SBE certified as defined by the solicitation's Instructions to Proposers Section 7.1.1? Yes ☐ No ☒

(select one)

If Yes, have you included your certification document? Yes ☐ No ☐
(select one)

NOTE: If you do not submit the SBE Certification document with your proposal, County will not apply the SBE Preference.

15. PROPOSAL/OFFER CERTIFICATION**CONTRACTOR LEGAL NAME:** PTG International, Inc**BUSINESS ALSO KNOWN AS:** _____**MAILING ADDRESS:** 13227 Executive Park Terrace**CITY/STATE/ZIP:** Germantown, MD 20874**REMIT TO ADDRESS:** 13227 Executive Park Terrace**CITY/STATE/ZIP:** Germantown, MD 20874**CONTACT PERSON NAME/TITLE:** Eugene de Ribeaux, President & CEO**PHONE:** 240-449-8482**FAX:** 301-972-2774**CONTACT PERSON EMAIL ADDRESS:** ederibeaux@ptg-intl.com**EMAIL ADDRESS FOR ORDERS & CONTRACTS:** ederibeaux@ptg-intl.com**CORPORATE HEADQUARTERS ADDRESS:** 13227 Executive Park Terrace, Germantown, MD 20874**WEBSITE:** <https://ptg-intl.com/>

By signing and submitting the Offer Agreement, the undersigned certifies that they are legally authorized to represent and bind Contractor to legal agreements, that all information submitted is accurate and complete, that Contractor has reviewed the County's Procurement website for solicitation amendments and has incorporated all such amendments to its offer, that Contractor is qualified and willing to provide the items requested, and that Contractor will comply with all requirements of the contract. The Unit Pricing includes all costs incidental to the provision of the items in compliance with the contract; no additional payment will be made. County may deem conditional offers that modify the solicitation requirements **"Non-Responsive"** and County may not evaluate them. Contractor's submission of a signed Offer Agreement will constitute a firm offer and upon the issuance of a MA or PO document issued by County's Procurement Director or authorized designee will form a binding contract that will require Contractor to provide the goods or services and materials described in this contract. The undersigned hereby offers to furnish the goods or services in compliance with all terms, conditions, and specifications in this Offer Agreement.

SIGNATURE: **DATE:** 6/15/2022Eugene de Ribeaux, President & CEO**PRINTED NAME & TITLE OF AUTHORIZED CONTRACTOR REPRESENTATIVE EXECUTING OFFER****PHONE AND EMAIL:** 240-449-8482, ederibeaux@ptg-intl.com

PIMA COUNTY STANDARD TERMS AND CONDITIONS

1. WARRANTY

Contractor warrants goods or services to be satisfactory and free from defects. Contractor also warrants that all products and services provided under this contract are non-infringing.

2. PACKING

Contractor will make no extra charges for packaging or packing material. Contractor is responsible for safe packaging conforming to carrier's requirements.

3. DELIVERY

On-time delivery of goods and services is an essential part of the consideration that County will receive.

Contractor must provide a guaranteed delivery date, or interval period from order release date to delivery if the Price proposal document requires it. Upon receipt of notification of delivery delay, County may cancel the order or extend delivery times at no cost to County. Any extension of delivery times will not be valid unless an authorized representative of County extends it to Contractor in writing.

To mitigate or prevent damages from delayed delivery, County may require Contractor to deliver additional quantity utilizing express modes of transport, or overtime, all costs to be Contractor's responsibility. County may cancel any delinquent order, procure from an alternate source, or refuse receipt of or return delayed deliveries at no cost to County. County may cancel any order or refuse delivery upon default by Contractor concerning time, cost, or manner of delivery.

Contractor is not responsible for unforeseen delivery delays caused by fires, strikes, acts of God, or other causes beyond Contractor's control, provided that Contractor provides County immediate notice of delay.

4. SPECIFICATION CHANGES

County may make changes in the specifications, services, or terms and conditions of an order. If such changes cause an increase or decrease in the amount due under an order or in time required for performance, County will make an acceptable adjustment and will modify the order in writing. No verbal agreement for adjustment is acceptable.

Nothing in this clause reduces Contractor's responsibility to proceed without delay in the delivery or performance of an order.

5. INSPECTION

County may inspect or test all goods and services at place of manufacture, destination, or both. Contractor will hold goods failing to meet specifications of the order or contract at Contractor's risk and County may return such goods to Contractor and Contractor will be responsible for costs for transportation, unpacking, inspection, repacking, reshipping, restocking or other like expenses. In lieu of return of nonconforming supplies, County may waive any nonconformity, receive the delivery, and treat the defect(s) as a warranty item, but any waiver of any condition will not apply to subsequent shipments or deliveries.

6. ACCEPTANCE OF MATERIALS AND SERVICES

County will not execute an acceptance or authorize payment for any service, equipment or component prior to delivery and verification that the delivery meets all specification requirements.

7. RIGHTS AND REMEDIES OF COUNTY FOR DEFAULT

If Contractor furnishes items that do not conform to the contract requirements, or to the sample that Contractor submitted, County may reject the items. Contractor must then reclaim and remove the items, without expense to County. Contractor must also immediately replace all rejected items with conforming items. Should Contractor fail, neglect, or refuse immediately to do so, County may purchase in the open market a corresponding quantity of any such items and deduct from any monies due or that may become due to Contractor the difference between the price named in the MA or Purchase Order ("PO") and the actual cost to County.

If Contractor fails to make prompt delivery of any item, County may purchase the item in the open market and invoke the reimbursement condition above apply, except when delivery is delayed by fire, strike, freight embargo, or acts of god or of the government. If County cancels a MA, PO or associated order, either in whole or in part, by reason of the default or breach by Contractor, Contractor will pay for any loss or damage sustained by County in procuring any items which Contractor was obligated to supply. These remedies are not exclusive and are in addition to any other rights and remedies provided by law or under the contract.

8. FRAUD AND COLLUSION

Contractor certifies that no officer or employee of County or of any subdivision thereof has aided or assisted Contractor in securing or attempting to secure a contract to furnish labor, materials or supplies at a higher price than that proposed by any other Contractor. Contractor also certifies that it is not aware of any County employee 1) favoring one Contractor over another by giving or withholding information or by willfully misleading a Proposer in regard to the character of the material or supplies called for or the conditions under which the proposed work is to be done; 2) knowingly accepting materials or supplies of a quality inferior to those called for by any contract; or 4) directly or indirectly having a financial interest in the proposal or resulting contract. Additionally, during the conduct of business with County, Contractor will not knowingly certify, or induce others to certify, to a greater amount of labor performed than has been actually performed, or to the receipt of a greater amount or different kind of material or supplies that has been actually received. If County finds at any time that Contractor has in presenting any proposal(s) colluded with any other party or parties for the purpose of preventing any other proposal being made, then County will terminate any contract so awarded and that person or entity will be liable for all damages that County sustains.

9. COOPERATIVE USE OF RESULTING CONTRACT

As allowed by law, County has entered into cooperative procurement agreements that enable other public agencies to utilize County's contracts. Those public agencies may contact Contractor with requests to provide services and products pursuant to the pricing, terms and conditions in the MA, or PO. A public agency and Contractor may make minor adjustments by written agreement to the contract to accommodate additional cost or other factors not present in the contract and required to satisfy particular public agency code or functional requirements and within the intended scope of the solicitation and resulting contract. The parties to the cooperative procurement will negotiate and transact any such usage in accordance with procurement rules, regulations and requirements. Contractor will hold harmless County, its officers, employees, and agents from and against all liability, including without limitation payment and performance associated with any cooperative agreement with another public agency. Contractor may view a list of agencies that are authorized to use County contracts at the Procurement Department Internet home page: <http://www.pima.gov/procure>, under the Vendor Information tab, by selecting the link titled County Cooperative Agreements – Authorized Agencies.

10. INTELLECTUAL PROPERTY INDEMNITY

Contractor will indemnify, defend and hold County, its officers, agents, and employees harmless from liability of any kind, including costs and expenses, for infringement or use of any copyrighted composition, secret process, patented or unpatented invention, article or appliance furnished or used in connection with the contract and any MA, PO, and associated orders. County may require Contractor to furnish a bond or other indemnification to County against any and all loss, damage, costs, expenses, claims and liability for patent or copyright infringement.

11. INDEMNIFICATION

Contractor will indemnify, defend, and hold harmless County, its officers, employees, and agents from and against any and all suits, actions, legal administrative proceedings, claims or demands and costs, including attorney's fees arising out of any act, omission, fault or negligence by Contractor, its agents, employees or anyone under its direction or control or on its behalf in connection with performance of the contract and any MA, PO or associated orders. Contractor will indemnify, defend and hold County harmless from any claim of infringement arising from services provided under this contract or from the provision, license, transfer or use for their intended purpose of any products provided under this Contract.

12. UNFAIR COMPETITION AND OTHER LAWS

Responses must comply with Arizona trade and commerce laws (Title 44 A.R.S.) and all other applicable County, State, and Federal laws and regulations.

13. COMPLIANCE WITH LAWS

Contractor will comply with all federal, state, and local laws, rules, regulations, standards and Executive Orders, without limitation. In the event any services that Contractor provides under this contract require a license issued by the Arizona Registrar of Contractors ("ROC"), Contractor certifies that a Contractor licensed by ROC to perform those services in Arizona will provide such services. The laws and regulations of the State of Arizona govern the interpretation and construction of this contract, and the rights, performance and disputes of and between the parties. Any action relating to this Contract must be filed and maintained in a court of the State of Arizona in Pima County.

14. ASSIGNMENT

Contractor may not assign its rights to the contract, in whole or in part, without prior written approval of County. County may withhold approval at its sole discretion, provided that County will not unreasonably withhold such approval.

15. CANCELLATION FOR CONFLICT OF INTEREST

This contract is subject to cancellation pursuant to A.R.S. §§38-506 and 38-511, the pertinent provisions of which are incorporated into this Contract by reference.

16. NON-DISCRIMINATION

Contractor agrees to comply with all provisions and requirements of Arizona Executive Order 2009-09 which is hereby incorporated into this contract as if set forth in full herein including flow down of all provisions and requirements to any subcontractors. During the performance of this contract, Contractor must not discriminate against any employee, client or any other individual in any way because of that person's age, race, creed, color, religion, sex, disability or national origin.

17. NON-APPROPRIATION OF FUNDS

County may cancel this contract if for any reason County's Board of Supervisors does not appropriate funds for the stated purpose of maintaining the contract. In the event of such cancellation, County has no further obligation, other than payment for services or goods that County has already received.

18. PUBLIC RECORDS

Disclosure. Pursuant to A.R.S. § 39-121 et seq., and A.R.S. § 34-603(H) in the case of construction or Architectural and Engineering services procured under A.R.S. Title 34, Chapter 6, all documents submitted in response to the solicitation resulting in award of this Contract, including, but not limited to, pricing schedules, product specifications, work plans, and any supporting documents, are public records. As such, those documents are subject to release and/or review by the general public upon request, including competitors.

Records Marked Confidential: Notice and Protective Order. If Contractor reasonably believes that some of those records contain proprietary, trade-secret or otherwise-confidential information, Contractor must prominently mark those records "CONFIDENTIAL." In the event a public-records request is submitted to County for records marked CONFIDENTIAL, County will notify Contractor of the request as soon as reasonably possible. County will release the records 10 business days after the date of that notice, unless Contractor has, within that period, secured an appropriate order from a court of competent jurisdiction, enjoining the release of the records. County will not, under any circumstances, be responsible for securing such an order, nor will County be in any way financially responsible for any costs associated with securing such an order.

Contractor agrees to waive confidentiality of any price terms.

19. CUSTOM TOOLING, DOCUMENTATION AND TRANSITIONAL SUPPORT

Costs to develop all tooling and documentation, such as and not limited to dies, molds, jigs, fixtures, artwork, film, patterns, digital files, work instructions, drawings, etc. necessary to provide the contracted services or products and unique to the services or products supplied to County are included in the agreed upon Unit Price unless the contract specifically states otherwise. Such tools and documentation are the property of County and will be marked, as is practical, as the "Property of Pima County" and County so requests, Contractor will deliver a copy of the tooling and documentation to County within twenty (20) days of acceptance by County of the first article sample, or not later than ten (10) days of termination of the contract associated with their development, without additional cost to County. Contractor also agrees to act in good faith to facilitate the transition of work to a subsequent Contractor if and as reasonably requested by County at no additional cost. Should exceptional circumstances be present that may justify an additional charge, Contractor may submit said justification and proposed cost and negotiate an agreement acceptable to both Contractor and County, but Contractor may not withhold any requested tooling, document or support as described above that would delay the orderly, efficient and prompt transition of work. Should conduct by Contractor result in additional costs to County, Contractor will reimburse County for said actual and incremental costs provided that County has given Contractor reasonable time to respond to County's requests for support.

20. AMERICANS WITH DISABILITIES ACT

Contractor will comply with all applicable provisions of the Americans with Disabilities Act (public law 101-336, 42 USC 12101-12213) and all applicable federal regulations under the act, including 28 CFR parts 35 and 36.

21. NON-EXCLUSIVE AGREEMENT

Contractor understands that this Contract is nonexclusive and is for the sole convenience of County. County may obtain like services from other sources for any reason.

22. TERMINATION

County may terminate any contract and any MA, PO, Delivery Order, DOM or issued NORFA, in whole or in part, at any time for any reason or no reason, without penalty or recourse, when in the best interests of County. Upon receipt of written notice, Contractor will immediately cease all work as directed by the notice, notify all subcontractors of the effective date of termination, and take appropriate actions to minimize further costs to County. In the event of termination under this paragraph, all documents, data, and reports prepared by Contractor under the contract become the property of County and Contractor must promptly deliver them to County. Contractor is entitled to receive just and equitable compensation for work in progress, work completed, and materials accepted by County before the effective date of the termination.

23. ORDER OF PRECEDENCE – CONFLICTING DOCUMENTS

In the event of inconsistencies between contract documents, the following is the order of precedence, superior to subordinate, that will apply to resolve the inconsistency: MA or PO; DO or DOM; Offer Agreement; these standard terms and conditions; any Contractor terms (Terms of Sale; End User Licenses Agreement; Service Agreement; etc.) attached to an MA, PO, DO or DOM, if applicable; any other solicitation documents.

24. INDEPENDENT CONTRACTOR

Contractor is an independent Contractor. Contractor and Contractor officer's agents or employees are not considered employees of County and are not entitled to receive any employment-related fringe benefits under County's Merit System. Contractor is responsible for paying all federal, state and local taxes associated with the compensation received pursuant to this Contract and will indemnify and hold County harmless from any and all liability which County may incur because of Contractor's failure to pay such taxes.

25. BOOK AND RECORDS

Contractor will keep and maintain proper and complete books, records and accounts, which will be open at all reasonable times for inspection and audit by duly authorized representatives of County. In addition, Contractor will retain all records relating to this contract at least five (5) years after its termination or cancellation or, if later, until any related pending proceeding or litigation has been closed.

26. COUNTERPARTS

The parties may execute the MA or PO that County awards pursuant to this solicitation in any number of counterparts, and each counterpart is considered an original, and together such counterparts constitute one and the same instrument. For the purposes of the MA and PO, the signed proposal of Contractor and the signed acceptance of County are each an original and together constitute a binding MA, if all other requirements for execution are present.

27. AUTHORITY TO CONTRACT

Contractor warrants its right and power to enter into the MA or PO. If any court or administrative agency determines that County does not have authority to enter into the MA or PO, County is not liable to Contractor or any third party by reason of such determination or by reason of the MA or PO.

28. FULL AND COMPLETE PERFORMANCE

The failure of either party to insist on one or more instances upon the full and complete performance with any of the terms or conditions of the contract and any MA, PO, DO or DOM to be performed on the part of the other, or to take any action permitted as a result thereof, is not a waiver or relinquishment of the right to insist upon full and complete performance of the same, or any other covenant or condition, either in the past or in the future. The acceptance by either party of sums less than may be due and owing it at any time is not an accord and satisfaction.

29. SUBCONTRACTORS

Contractor is fully responsible for all acts and omissions of any subcontractor and of persons directly or indirectly employed by any subcontractor, and of persons for whose acts Contractor may be liable to the same extent that Contractor is responsible for the acts and omissions of persons that it directly employs. Nothing in this contract creates any obligation on the part of County to pay or see to the payment of any money due any subcontractor, except as may be required by law.

30. SEVERABILITY

Each provision of this contract stands alone, and any provision of this contract that a court finds to be prohibited by law is ineffective to the extent of such prohibition without invalidating the remainder of this contract.

31. LEGAL ARIZONA WORKERS ACT COMPLIANCE

For the procurement of services in the State of Arizona, Contractor hereby warrants that it will at all times during the term of this contract comply with all federal immigration laws applicable to Contractor's employment of its employees, and with the requirements of A.R.S. § 23-214 (A) (together the "State and Federal Immigration Laws"). Contractor will further ensure that each subcontractor who performs any work for Contractor under this contract likewise complies with the State and Federal Immigration Laws.

County has the right at any time to inspect the books and records of Contractor and any subcontractor in order to verify such party's compliance with the State and Federal Immigration Laws.

Any breach of Contractor's or any subcontractor's warranty of compliance with the State and Federal Immigration Laws, or of any other provision of this section, is a material breach of this Contract subjecting Contractor to penalties up to and including suspension or termination of this Contract. If the breach is by a subcontractor, and the subcontract is suspended or terminated as a result, Contractor will take such steps as may be necessary to either self-perform the services that would have been provided under the subcontract or retain a replacement subcontractor as soon as possible so as not to delay project completion.

Contractor will advise each subcontractor of County's rights, and the subcontractor's obligations, under this Section by including a provision in each subcontract substantially in the following form:

"Subcontractor hereby warrants that it will at all times during the term of this contract comply with all federal immigration laws applicable to Subcontractor's employees, and with the requirements of A.R.S. § 23-214 (A). Subcontractor further agrees that County may inspect the Subcontractor's books and records to ensure that Subcontractor is in compliance with these requirements. Any breach of this paragraph by Subcontractor is a material breach of this contract subjecting Subcontractor to penalties up to and including suspension or termination of this contract."

Any additional costs attributable directly or indirectly to remedial action under this Section is the responsibility of Contractor. In the event that remedial action under this Section results in delay to one or more tasks on the critical path of Contractor's approved construction or critical milestones schedule, such period of delay will be excusable delay for which Contractor is entitled to an extension of time, but not costs.

32. CONTROL OF DATA PROVIDED BY COUNTY

For those projects and contracts where County has provided data to enable the Contractor to provide contracted services or products, unless County otherwise specifies and agrees in writing, Contractor will treat, control and limit access to said information as confidential and will under no circumstances release any data provided by County during the term of this contract and thereafter, including but not limited to personal identifying information as defined by A.R.S. § 44-1373, and Contractor is further prohibited from selling such data directly or through a third party. Upon termination or completion of the contract, Contractor will either return all such data to County or will destroy such data and confirm destruction in writing in a timely manner not to exceed sixty (60) calendar days.

33. ISRAEL BOYCOTT CERTIFICATION

Pursuant to A.R.S. § 35-393.01, if Contractor engages in for-profit activity and has ten (10) or more employees, and if this Contract has a value of \$100,000.00 or more, Contractor certifies it is not currently engaged in, and agrees for the duration of this Contract to not engage in, a boycott of goods or services from Israel. This certification does not apply to a boycott prohibited by 50 U.S.C. § 4842 or a regulation issued pursuant to 50 U.S.C. § 4842.

34. ENTIRE AGREEMENT

This document constitutes the entire agreement between the parties pertaining to the subject matter it addresses, and this Contract supersedes all prior or contemporaneous agreements and understandings, oral or written.

END OF PIMA COUNTY STANDARD TERMS AND CONDITIONS

EXHIBIT B: MINIMUM QUALIFICATIONS VERIFICATION FORM (1 PAGE)**PROPOSER'S
NAME:**PTG International, Inc

Proposer certifies that they possess the following minimum qualifications and will provide the requested documents that substantiate their satisfaction of the Minimum Qualifications. Failure to provide the information required by these Minimum Qualifications and required to substantiate responsibility may be cause for the Proposer's proposal to be rejected as **"Non-Responsive."**

Provide documented and verifiable evidence that your firm satisfies the following Minimum Qualifications, and indicate what/if attachments are submitted.

ITEM NO.	MINIMUM QUALIFICATIONS	COMPLIANCE YES/NO (SELECT ONE)	DOCUMENT TITLE AND NUMBER OF PAGES SUBMITTED FOR EACH DOCUMENT
1	Please provide some examples of major work projects, which date back three years; and demonstrate proof of experience in designing and developing e-learning training courses for organizations (government and/or corporate) using Articulate software.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Appendix A: Work Samples # of pages = 9
2	Please provide Systems for Award Management (SAM) Certification	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	PTG SAM Certification.pdf # of pages = 5

SIGNATURE:

DATE: 6/15/2022

Eugene de Ribeaux, President & CEO

PRINTED NAME & TITLE OF AUTHORIZED PROPOSER REPRESENTATIVE EXECUTING PROPOSAL

END OF EXHIBIT B

EXHIBIT C: QUESTIONNAIRE (2 PAGES)**PROPOSER'S
NAME:**PTG International, Inc

Department evaluation team will develop questions that when answered/submitted by Proposers will allow evaluators to evaluate, differentiate & score Proposers' proposals as defined by the published evaluation criteria. The evaluation committee will assign points to each proposal submitted on the basis of the following evaluation criteria unless otherwise indicated.

7.1. Cost (0 to 40 points)

Utilize **UNIT PRICES (Net 30-day Payment Terms)** spreadsheet in the **Offer Agreement** Section to provide a price per 15/30/60 min course including a price breakdown of all design details such as instructional design and script-writing, revisions, narration, e-learning design, templates, and any other pertinent design and development elements. Pricing discounts available such as preferred customer, new customer, price breaks per number of courses contracted, price for a series of courses, etc.

7.2. References (0 to 8 points)

Provide three (3) references (within the last 2 years) from companies/organizations addressing quality of product delivered, level of customer service, responsiveness/communication with client, and ease of process.

7.3. Project Plan (0 to 30 points)

Proposer must provide a thorough project plan to include a milestone chart including tasks to be performed, the time frame, and proposed staff member designated for the completion of each task. The courses will be developed to the specifications of the divisions regarding topics and content. Content will be supplied by the PCHD. The courses will be delivered electronically and able to be uploaded to the Learning Management System. PCHD will retain all developed courses and templates and source files. Custom, branded course and player templates will be developed in both Articulate Rise and Storyline.

- **Description of Work (12 points)**

- Please review the general and item specifications and advise which requirements, if any, you will not be able to meet.
- Number of revisions allowed from PCHD w/o affecting course price
- What third party media (stock photos/images etc.) can you provide? Do you have any subscriptions for use of media that is not public domain but can be used in clients' product? Do you have any issues with using Pima County branding in your product?
- Please list the content/design elements that you are capable of assisting PCHD to develop (scripts, interactive elements, animated elements, storyboards, PCHD related photos, etc.)
- Please provide examples of content that must be provided by PCHD (scripts, interactive elements, animated elements, storyboards, PCHD related photos, etc.)
- Describe your workflow requirements. Can multiple courses be developed at one time?
- Develop interactive elements into each course.
- Develop knowledge checks within each course.
- Include/link/attach any PCHD-provided documents and other resources to the course.
- Enhance visual design of the course by adding professional images, animations, and other design elements.

- **What are your estimated timelines (per course) for: (8 points)**

- Instructional Design
- Script development
- Course design/development
- Narration (if selected)
- Course review/revisions
- Final course delivery
- How much slack time is included in the timelines above to allow for scheduling conflicts with SMEs?

- **Please describe your project management team and their responsibilities. (5 points)**
- **What expectations/schedule/deadlines will you have of the PCHD project teams? (5 points)**
 - Will you require the PCHD project teams to have access to any project management software (MS Project, etc.) or software programs other than Articulate in order to work on/communicate about/complete the projects?
 - Do you have alternative methods to use if PCHD cannot access required software due to Pima County security firewalls, lack of interface ability with vendor software or budget considerations?

7.4. Samples of Work (0 to 20 points)

Provide three (3) examples of different, recently completed work (within last 2 years) in areas such as converting existing Instructor Led Training to e-learning, new designs/ideas for technical training, unique interactive elements, etc.

7.5. Sustainability (0 to 2 points)

Proposers should provide vendors' operating practices and materials handling directed at using less, recycling, and minimizing overall impact on the environment.

SIGNATURE: 

DATE: 6/15/2022

Eugene de Ribeaux, President & CEO

PRINTED NAME & TITLE OF AUTHORIZED PROPOSER REPRESENTATIVE EXECUTING PROPOSAL**END OF EXHIBIT C**

PTG INTERNATIONAL, INC.

PROPOSAL RESPONSE



Solicitation Number: RFP-PO-2200021

Title: E-Course Design and Development

Submitted on June 16, 2022 by:



Submitted to:
Pima County Procurement Department
150 West Congress, 5th Floor
Tucson, Arizona 85701

Brandon Morgan,
Procurement Officer

Submitted by:
PTG International, Inc.
Eugene de Ribeaux
President & CEO
13227 Executive Park Terrace
Germantown, MD 20874

This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed – in whole or in part – for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this offeror as a result of – or in connection with – the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction.

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Introduction

The PTG Team has successful experience in all task areas of this contract, including at the Federal Highway Administration (FHWA), which includes updating and converting instructional content into innovative training solutions. Our team looks forward to continuing to serve FHWA with innovative training solutions, including incorporating engaging instructional strategies.

The PTG Team's proposal describes the relevance, quality, and extent of our experience in all technical areas needed to successfully implement The Pima County Health Department (PCHD) vision for this work and complete this vital project. We have reviewed the solicitation and understand the project purpose, specifications, and scope of work. Our proposal reflects this understanding and offers the finest resources and talents in the areas of E-Course design and development. The PTG Team will provide turnkey training development solutions that support the advancement of the state of practice and provide an engaging and learner-centric training experience for creating E-Course Design and Development using Articulate software.

An NHI training program manager rated the PTG Team as "exceptional," saying our team "thinks outside the box" and that our team members are "helping not just inform but change the way people are doing their work."

PTG is very seasoned at converting existing Instructor Led Training to an e-learning format or creating e-courses from the ground up, incorporating new designs and ideas for technical training, unique integrative elements, and resources. The proposed team has years of experience in course design, development, and evaluation with several federal, state, and regional government agencies. Our proposed team has completed scores of technology-driven training development projects that address various target audiences' unique needs and challenges. Our team also has experience in course reconceptualization—taking courses in traditional learning formats and deploying them uniquely that meet the modern learner's needs while upholding all that we know about adult learning, information application, and knowledge retention. Most recently, the PTG Team worked with the US Department of Transportation to develop a blended learning solution for a course titled "FHWA Civil Rights: Risk Mitigation Through Title VI Reviews." This project showcases the PTG Team's ability to provide an organized, focused course design and development approach that takes advantage of multiple effective learning delivery formats. It provided succinct, detailed, and appropriate learning elements that were highly consumable by the learner. This course uses web-conferencing functionalities and LMS capabilities to provide a clear and intuitive course delivery mechanism, capitalize on participants' existing knowledge and experience, and provide participants with completed work they can take back to their jobs as concrete accomplishments of their effort.

PTG personnel have designed, developed, and launched more than 200 courses that are live and available through the AASHTO Store. PTG uses Articulate 360 tools for authoring courses, including Articulate Presenter 360, Storyline 360, and Rise 360. PTG develops these trainings using animation, graphics, and visual aids to improve the usability and instructional soundness of the training. Instructional systems designers and production staff work together to build 2D and 3D simulated graphic animations to further enhance web-based training, tutorials, videos, webinars, and web-based lab simulations. Each course has embedded learning validation, whether that be a standard knowledge check, programmed interaction, or other learning element designed for learners to self-assess their knowledge.

Background

The Pima County Health Department (PCHD) is seeking the resources for the development of self-directed, customized e-learning training courses designed and developed using Articulate software, as requested by divisions in the Health Department. The courses will be developed to the specifications of the divisions regarding topics and content. Content will be supplied by the PCHD. The courses will be delivered electronically and able to be uploaded to the Learning Management System. Custom, branded course and player templates will be developed in Articulate Rise and Storyline.

The published courses will be compliant with the Sharable Content Object Reference Model (SCORM). Courses will be uploaded to the PCHD Learning Management System (LMS) for delivery. These courses will be Section 508 compliance, including color contrast ratio compliance, focus/tab order, text styles, alternate text labeling, and PDFs of complete courses.

Self-directed elements will provide the foundation for the course design. The PTG Team understands the importance of motivating adult learners and techniques and practices that serve this purpose. The PTG Team understands the modern adult learner. Learning needs to be task based, focused, and immediately relatable to the learner's world. Interactivity is a highly effective design principle in this vein—promoting learning and application simultaneously and helping adult learners achieve learning goals.

Modules can provide opportunities for practice and application, references to relevant tools, and case studies to support implementation. Some content or topics may be particularly well-suited to the use of a gamification approach because the course has immediate real-world applications. Learners can review a concept and then immediately apply it in an interactive-style element. For example, learners may first watch an animated explainer video developed in Articulate Storyline to learn the basics. Once that engaging video is complete, learners then attempt a scenario-based game.

The PTG team understands how to use interactive techniques in various implementations. Knowing the learners and identifying the learning objectives are the keys to getting self-directed learning right, as is understanding that motivations vary according to the task, objective, and learner. In choosing to implement interactive elements in training, the mechanics to enhance the experience must be appropriate to the learner. The "key learner types" should also be defined so that presentation techniques will motivate effectively. The PTG team understands these principles and knows how to apply experience design to increase engagement through pleasurable activity and satisfy the bigger picture—i.e., meeting the course learning outcomes and the organization's goals. Learning styles will also address auditory, visual, verbal, and kinesthetic preferences through the instructional design. The PTG team will carefully weave these elements into the learning and not merely insert one large feature.

Document Organization

The portions that follow in this proposal will demonstrate the strengths of PTG and the talents it brings to PCHD.

Below we have addressed the qualifications of our personnel resources and the ingenuity they bring to PCHD, our project management approach, workflow, instructional design discipline, and technology experience. We have included three samples in the appendix, including live links for your review. Our references have sent their responses directly to the Pima County Procurement

Officer, Brandon Morgan. Your records will show you have received emails from Caitlin Carter, National Transit Institute; Thomas Elliott, DOT National Highway Institute; and Danielle Mathis-Lee of the Federal Highway Administration.

- Experienced Key Personnel
- Training Development Guidelines
- Project Meetings and Checkpoints
- Workflow Process
- Cost
- Sustainability

Experienced Key Personnel

The PTG team is comprised of highly qualified, creative, and talented people that offer years of experience and expertise in all facets of training and curriculum development. Our instructional systems designers (ISDs) bring decades of experience to each project to ensure our training products are innovative, learner-centered, and instructionally sound. Our distance learning developers are experts in industry-standard rapid development tools and applications, allowing to produce quality instruction in a short timeframe. Our virtual designers, technicians, and programmers have the background and experience to design, develop, configure, and support all virtual technology training and events. Our technical editors have extensive experience working with industry standards and style guides and are highly skilled in translating technical information into plain language, keeping project narration text, documentation, and dialogue consistent and clear. Lastly, our seasoned project manager brings a proven track record of project success, from small tutorial projects to extensive, multimillion dollar curriculum development efforts, ensuring projects are completed to our customer's expectations and standards on time and within budget—every time.

Tom Tatem, our proposed Project Manager, has managed staff, teams, and departments of training development professionals including technologists, programmers, media creatives, human capital, and instructional design professionals. As a project manager he has delivered complex modeling and simulation, full feature media productions, training, and evaluation analysis. He will actively provide leadership in learning experience design and client services to this project. He was a Federal Highway Administration/National Highway Institute (NHI) Master Trainer and an NHI-certified instructor for Web Conference Training, VILT and hosting the Adobe Connect platform. For nearly the past ten years he has focused on producing traditional and virtual classroom training and e-learning packages for federal, state, and municipal transportation engineers. Currently he also serves as a Commissioner with the International Accreditors for Continuing Education and Training (IACET)."

Our proposed Senior Instructional Systems Designer, Emily Lloyd has 15 years of extensive experience in training and curriculum analysis, instructional design and development, and training evaluation. Since 2006, Emily has developed 50+ web-based trainings for NHI and is extremely familiar with their LMS specifications, features, and functionality. She has a Master of Education degree in Curriculum and Instruction, Instructional Technology from George Mason University, and she is an Associate of the eLearning Guild. She is skilled in instructional design,

storyboarding, LMS integration, mobile content design and development, writing/editing, Section 508 compliance, and standards (SCORM, etc.). She is proficient in Adobe Captivate, Articulate Storyline, Adobe Presenter, Articulate Presenter, Adobe Acrobat Pro DC, Adobe Creative Cloud, and DaVinci Resolve. For the past 15 years, she has been involved in supporting clients by creating highly engaging, learner-focused instruction, incorporating gamification and virtual instructor techniques. She has experience with creating more than a dozen various complex instructional design-related projects with the various tools mentioned above that display her expertise in the application of adult learning principles.

Our Technical Writer, Macie Melendez, has more than 10 years of experience working for magazines, newspapers, and publishing/media companies along with her work in the public sector. She has strong organizational skills and thrives in deadline-driven environments. She is detail oriented, responsible, and independent. She currently serves as the editor and proofreader for several web-based training projects, where she ensures that all the trainings are accurate and consistent and provides the best information for the intended audience. Previous contributions have included the technical writing and editing of web-based content for the Highway Materials Engineering Course modules, Transportation Performance Management modules, and use of 3D Engineered Models in Construction Training. She has also contributed her writing and editing skills to the ITS JPO Case Study on Adaptive Signal Control Technologies, AASHTO, and reviewed web-based content, informational brochures, and fact sheets for several FHWA offices.

Section 508 compliance will be enforced and remediated by our 508 testers, Javier Machado and Eric Melendez. Each of whom have experience with federal government client which also require compliance for accessibility. These industry qualifications along with 20 years of experience in web development and content delivery brings a solid QA/QC professional experience to the team.

Javier Machado is a web-based training production developer with extensive experience in several rapid development and distance learning tools. For the past 4 years, he has worked for the public and private sectors and has been involved in web-based training-related projects, design, and development initiatives. His ability to quickly learn software applications and tools has allowed him to work on several projects simultaneously. Machado is experienced in applying the right rapid development tools, enhancing graphics and illustrations, and is versed with incorporating other media, including video, to each project assigned. He is also proficient in both the Windows and Mac application worlds.

Eric Melendez has 18 years of experience working in an educational environment, including at the community college and university levels at both private and public institutions. As Director of a Continuing Education Department for ten years, he built, oversaw, and managed more than 50 online courses using several learning management systems, which were offered continuously. Melendez has extensive experience maintaining and overseeing online learning databases, including one with more than 20,000 course registrants.

Most recently, he has used this experience to program and update web-based trainings using rapid development programs. Melendez is a quick study and is skilled in several products and tools used for the development of distance learning including Articulate, PowerPoint, and Adobe Premier.

This staff will be augmented by our pool of freelancers and surge support as the need for specialist arise.

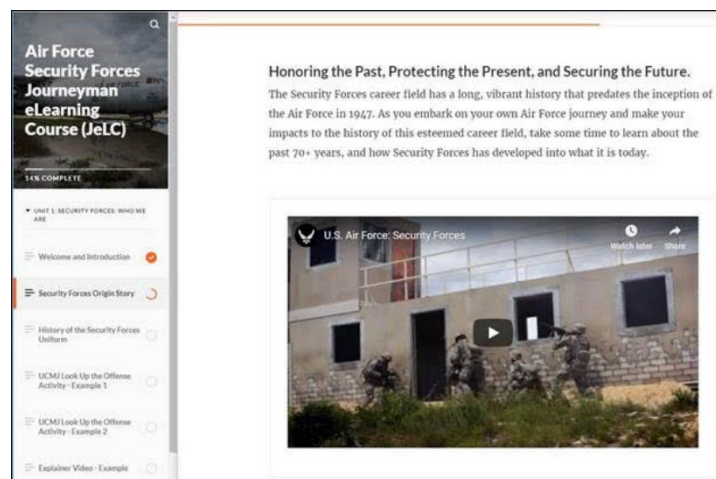
Project Delivery Know-How

The PTG Team fully understands and appreciates the work and expertise that goes into a large-scale conversion project like the development of up to fifty 30-minute WBTs for PCHD. The work described in this section demonstrates the critical knowledge necessary to make this project successful. We have **included active links** to past projects that provide examples of work performed with a similar size, scope, and complexity. Innovative instructional strategies and client training solutions are noted below and can be viewed using the active links.

Applying Innovation. Members of the PTG Team updated the [Air Force Security Forces \(SF\) Journeyman eLearning Course \(JeLC\)](#) from a 600-page text- and illustration-based format to more versatile blended approach, using highly interactive and engaging design techniques. The PTG Team conducted an extensive analysis of current instructional methods and then designed and provided proof of concept of a technology-driven, innovative instructional solution for approximately 40 hours of instructional content. This approach blended mobile and trainer-led modes of delivery with scenario-based and performance-driven instruction to create a unique training experience for adult learners.

This solution was designed to be delivered via the Air Force's Learning Services Ecosystem (AFLSE) using devices and equipment already in place at the organization and owned by the target audience to minimize costs and obstacles to success. This design achieved a critical goal of this project, which was to design an exemplar training product that demonstrates the expanded realm of possibilities for learning content delivered via AFLSE and stimulate all Air Force career fields to consider options to improve the designs of their learning products.

The blended course design contained both instructor- or trainer-led lessons and web-based components in HTML5 format using both SCORM-conformance and xAPI activity statements to track learner progress (using Articulate Rise). The course also included rubrics for trainers to inform competency assessment and guide learner remediation, if necessary.



These tools were designed to standardize the approach for achieving the ultimate outcomes for learners while empowering trainers to run the session in a way that makes the most sense for their base or location.

The end course design included scenario-based learning, performance-based learning, and other multifaceted modes of learning. All content was carefully analyzed to determine the most ideal approach for each concept. This resulted in a versatile and customized course that delivers content in the most optimal way possible. The proposed course is a highly engaging and interactive blended course that uses online, offline, and trainer-led instructional approaches.

Continued Success – Members of the PTG Team have been working with AASHTO since 2014 building more than 30 hours of online training each year and supporting their learning management system (LMS) needs. Our team started by helping to set up and launch AASHTO’s distance learning platform. We determined functional requirements for the learning system, built and configured a commercial off-the-shelf LMS to meet the determined functional requirements, developed the course protocols and standards for implementation, and developed processes and procedures for managing business analyst and business administration functions related to web-based courseware. We continue to maintain and administer the LMS for AASHTO on an annual basis.

In addition to the systems infrastructure work we have done for AASHTO, the PTG Team has designed, developed, and launched more than 250 courses that are live and available through the AASHTO Store. The PTG Team uses Articulate 360 tools for authoring courses including Articulate Studio 360, Storyline 360, and Rise 360. The PTG production team develops these trainings using a variety of instructional strategies including animation, graphics, and visual aids to improve the usability and instructional soundness of the training. ISDs and production staff work together to build 2D and 3D simulated graphic animations to further enhance web-based training, tutorials, videos, and web-based lab simulations. Each course has embedded learning validation, whether that be a standard knowledge check, programmed interaction, or other learning element designed for learners to self-assess their knowledge.

The PTG Team has received feedback from our FHWA/NHI client that “everything has been on time or early” and our team members “provide extra value by proposing and executing mechanisms that allow for better learner engagement, comprehension, transfer of learning...and those things that make training effective.”

PTG Team members just completed updating all existing Flash-based courses to be in HTML5, mobile-compliant format. We are also developing new training content in addition to other instructional design and development efforts for the organization including expanding the video library and continuing to grow the library of over 200 mobile job aids.

Crucial Timeline – The PTG Team project manager, along with instructional designers and training production technicians, redesigned and developed a new version of the FHWA Highway Materials Engineering Course (HMEC) within an 11-month timeframe. The HMEC contained more than 180 hours of training (30 hours of web-based training, 20 hours of web-conference training, 120 hours of classroom-based, instructor-led training and associated lab sessions, and 10 hours of independent study). Given the vast amount of training developed, and working within FHWA budget and time constraints, PTG Team members reworked the 6-week instructor-led training course into a blended learning experience that included web-conference, web-based, independent study, and instructor-led training.

The team members also worked with FHWA to build a delivery platform for the web-based and web-conference portions of the HMEC. Hands-on laboratory experiences were developed and delivered by AMRL and partners. The lab experiences provided participants will real-world, contextualized learning opportunities that involved soils, aggregates, asphalt, steel (welding), coatings, and concrete. Finally, our team offered an innovative solution to provide the 9,000-plus pages of instructional and reference material electronically on a tablet in lieu of printing. The team members worked with FHWA, State DOT, industry associations, and renowned national experts to provide award-winning training. The course was recognized at the 2015 Training Officers Conference.

Training Development Guidelines

Having the training development framework in place at the beginning of each project is the key to success. Our team has developed and refined that framework through the creation of several hundreds of courses for FHWA and AASHTO since 2007.

Applying Instructional Design Standards. The team will use a thoughtful process for developing high-impact training that follows principles of the industry standard Analyze, Design, Develop, Implement, and Evaluate (ADDIE) model. The PTG Team has years of experience employing our ADDIE-based rapid development process in all delivery formats and will use this process to develop course materials and create the most relevant technical training. Using a process based on the ADDIE model sets the stage for continuous involvement of the project stakeholders during the development process. This helps to ensure the resulting course meets the project objectives and is seamless and well designed.

Ensuring ADA Section 508 Standards. It is important to ensure compliance with ADA Section 508 standards throughout the course update process. Our understanding of ADA Section 508 compliance and experience creating Section 508-compliant products starts from the beginning of a project and remains incorporated into the project design and development process. The PTG Section 508 Compliance Plan will be submitted to the Contracting Officer's Representative (COR) and lists the tests performed to adhere to ADA Section 508 Standards.

Implementing Pima County Branding (Standards and Style Guides). Application of standards and styles is important for consistency and quality in learning products. The Pima County branding will be applied to the web-based training deliverables, and the PTG Team is confident that we can also apply consistent styles and standards to all conversion projects. We have built and applied styles and standards guides to most clients for training products and have found that they provide a great foundation for consistent language use, appearance, and overall quality.

Understanding LMS and SCORM Requirements. Members of the proposed development team have been working with over 30 state DOTs and are well versed in several LMS products and understand the necessary setting requirements for compatible training products. Many of our projects are built in Articulate Storyline 360 and are published in SCORM so that they are trackable for registration, completion, and exam scoring purposes. Articulate Storyline allows courses to be built in an HTML5 environment and compatible with all browsers and devices (laptops, tablets, and phones).

Facilities and Connectivity

PTG headquarters is located in Germantown, Maryland. However, PTG Team members reside throughout the United States and thus work in a virtual office environment. Experience has shown that we can work effectively and keep the team connected by using our Microsoft Teams, Zoom, Adobe Connect, or GoToMeeting rooms for web-conferencing on a regular basis and SharePoint or Dropbox to create an online repository for collaboration and archiving of materials.

Project Meetings and Checkpoints

PTG is committed to the timeliness of all deliverables and will hold its personnel and subcontractors accountable to providing deliverables prior to their deadlines as part of project management and planning. The primary tool to our success in this process is timely and regular communications. Our management plan will include the events described below.

Kick-off Meeting. The PTG Team prepares for a kick-off meeting via web or teleconference immediately following each Task Order award. Our experience in formal project management

and coordination involves incorporating best practices, including the Project Management Body of Knowledge methodologies. These practices are monitored and reinforced by PTG's corporate PMO that is led by a certified Project Management Professional (PMP).

The PTG Team leverages the kick-off meeting to develop a strong working relationship and to establish effective lines of communication. Typically, 5 business days before the kick-off meeting, the PTG Team provides FHWA with an agenda and draft work plan schedule that outlines milestone dates for the training. The work plan schedule provides all the interim tasks, subtasks, resources, linkage, start/end dates, percentage complete, and other schedule-related information. We use Microsoft Project to track project and task progress.

Alternative methods or software is available to accommodate PCHD needs of accessing teleconferencing for example using Teams. The output of software like Microsoft Project can be displayed or made available outside of MS Project, for example using PDF files and other methods to make the information accessible to PCHD.

During the kick-off meeting, the team explains our instructional approach to accomplishing project objectives, milestones, and the work plan. The main objectives at the kick-off meeting are to reach a consensus on course development timeline and prioritize deliverables for course components, including proposed innovative delivery methods. The PTG Team takes detailed notes during the meeting, summarizing main outcomes. In addition, the kick-off meeting is used to:

- Introduce key personnel and resources
- Review task order requirements
- Provide background information
- Review existing course content and all Government-furnished materials
- Clarify issues, concerns, and questions about the proposed project deliverables
- Define roles and responsibilities
- Identify any conferences, holidays, or other conflicts that impact the ability to participate in meetings or provide reviews
- Discuss ADA Section 508 compliance requirements
- Review proposed timelines
- Identify format of progress reports

Within 5 business days of the meeting, the PTG Team documents and formats the minutes and provides them to PCHD. Our team incorporates comments into the preliminary work plan schedule and delivers the schedule with meeting notes. Once PCHD responds with comments about the minutes, our team submits a final written response within 5 business days.

Kick-off deliverables include kick-off meeting agenda items, minutes delivered to PCHD, final work plan schedule, proposed learning outcomes, and outline.

Technical Review Meetings. The technical review meetings, which will be scheduled by PTG, are an essential opportunity to validate progress with PCHD and the project SMEs when materials are at appropriate checkpoints in the development process. Our team members carefully coordinate participants for each of the technical review meetings to optimize outcomes. Vital to the success of the technical review meetings is setting clear goals for the meeting, identifying the right participants, providing enough lead time for the participants to gather information or review read-ahead material, creating an environment conducive to sharing information, and successfully facilitating the meeting to stay on track with achieving the desired goals. Each meeting will have a meeting agenda outlining meeting topics and discussion points. These meetings will be used to resolve questions or obtain clarification once our team has thoroughly reviewed and vetted the comments and feedback provided.

“The PTG Team members have a very active management plan. They keep me well informed long before minor issues become major problems. We are able to make adjustments to development/deployment strategies in the early stages before the development work begins, which makes the project more effective and keeps it on time.” – NHI Program Manager, referring to the PTG Team’s successful performance.

If needed, the PTG Team members will distribute a comment review form along with the draft materials. Use of the comment review form provides traceability of comments from SMEs and PCHD to their resolution or disposition. At the technical review meetings, the team will be prepared to address technical issues, clarify questions on content, and explain any learning techniques in the course. The technical review meetings are conducted using web-conferencing technologies unless otherwise specified.

The technical review meetings will include PCHD as well as the PTG’s project manager, instructional systems designer (ISD), and any others needed. The team will record comments from those in attendance into a disposition report, incorporate them in the course materials, and provide the revised materials to the PCHD (when requested).

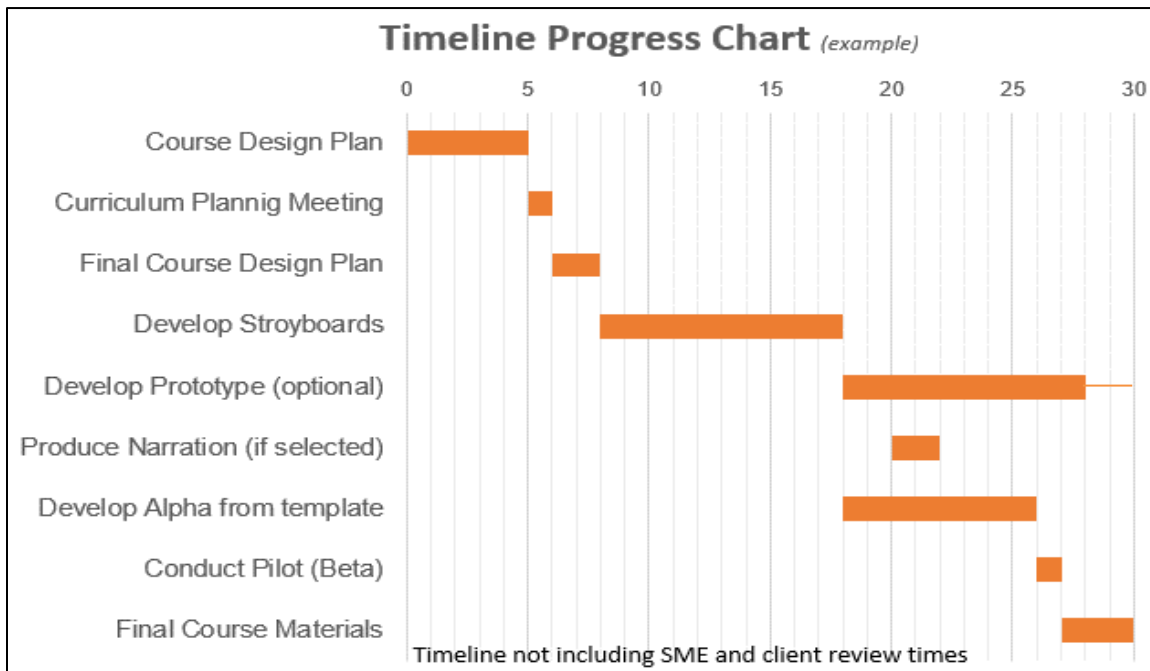
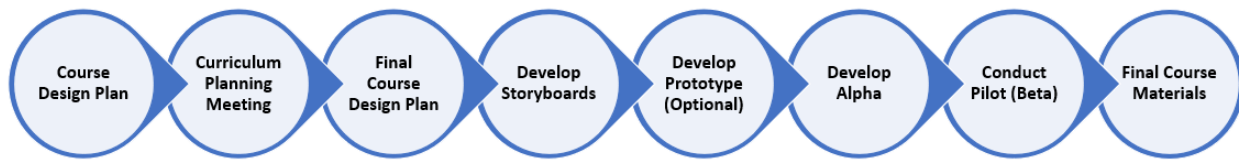
Deliverables include a technical review meeting agenda and setup, minutes (including key decisions, next steps, and action items), revised deliverables, and a comment review form with disposition.

Typical Workflow Process

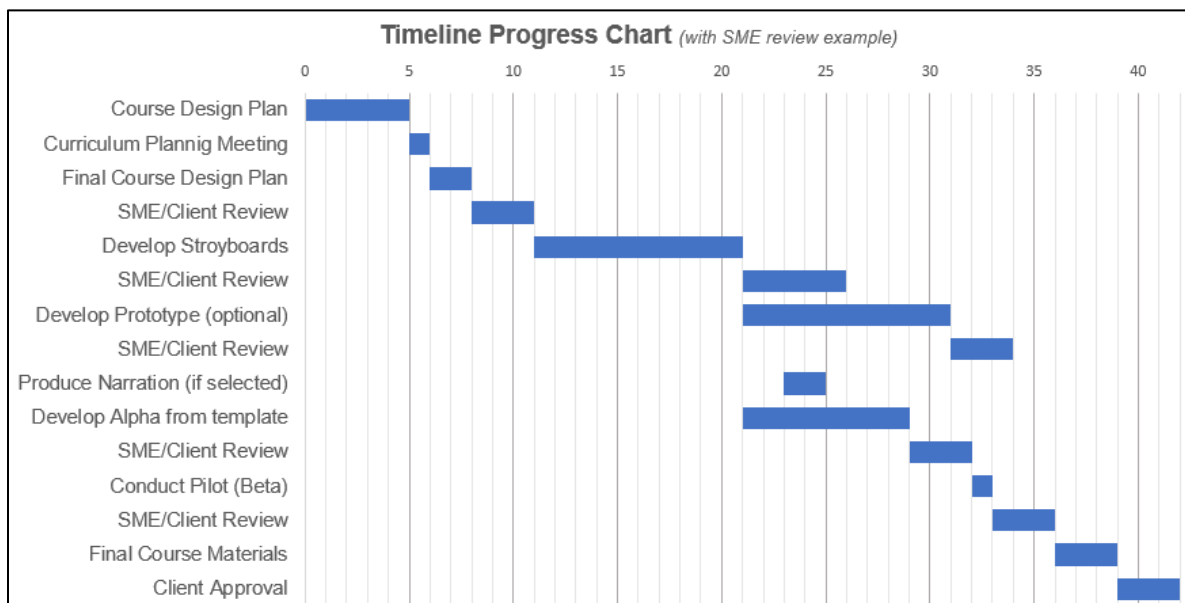
Our Workflow accommodates simultaneous course development. An example is The Federal Highway Administration (FHWA) had PTG over the two years produce course to support local communities and tribal communities. We now have 26 courses live. To sample them follow this link to FHWA. https://www.fhwa.dot.gov/clas/ttap/online_training.aspx We now have 10 additional courses under development. We are accustomed to developing more than one course at a time.

We understand and appreciate the PCHD plan to have an initial pilot training course at the beginning of this effort to check workflow and to make sure there is clear communication and agreement on responsibilities and timelines. Using that experience and collecting concerns and recommendations by meeting after the pilot course, we can adjust and accommodate for lessons learned in the approach on the course to follow.

This training development effort will follow our successful framework approach for the development of the course content.



Optional Tasks will extend the timeline



Optional Tasks will extend the timeline

Course Design Plan (CDP)

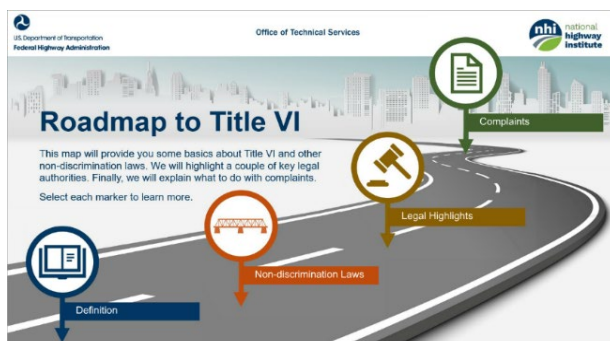
The CDP serves as a blueprint for the overall course update, design, and development approach. It will contain information the PTG Team has gathered at the kick off meeting and received related to the course design to date. This is a collaborative effort between PCHD subject matter experts and instructional designers. In developing the draft CDP, the PTG Team will analyze the existing materials to identify course and lesson level outcomes, content “chunking,” presentation approach, instructional strategies, engagement techniques, and evaluation/validation strategies. The course will be designed to provide a state-of-the-art, adaptive training program using modern training instruction and delivery methods that are geared to the learning needs of the adult learner, exercise the principles of gamification from an adult education perspective, and take advantage of the responsive capabilities of the latest instructional technology tools. This document will lay out what strategies will be used, and the medium which will be best suited for the desired results such as incorporating practice and references into the supplemental workbook.

The CDP will focus on a set of revised learning objectives that lead to overarching learning goals. The design plan will include the gamification strategies to be leveraged in support of successful and effective completion of the learning outcomes. The use of innovative instructional strategies will incorporate both intrinsic and extrinsic psychological motivators to encourage the participant engage with the training content, complete the training in a timely manner and experience higher-levels of knowledge transfer and retention over traditional web-based training

Where appropriate, the CDP will also contain links to samples, designs, and instructional approaches to communicate these strategies and their look/feel/function to all members of the project team (such as GUI and navigational options). Effective course evaluation analysis starts with valid assessments, which can be traditional multiple-choice questions or a scenario-based homework assessment. To ensure assessment validity, the PTG Team includes assessment opportunities in the design plan and has developed a straightforward assessment question approach that aligns learning outcomes with assessment questions and cites the location in the course where the assessment question content is covered.

The following examples highlight a few instructional design strategies that we have used and may be proposed. Please note that this list may be expanded as we work through the CDP and storyboards.

- **Gamified WBT** – Traditional web-based training is an asynchronous, instructional product that



typically combines text, graphics, audio, video, interactive or “selectable” elements, and questions /knowledge checks into a comprehensive, self-contained learning experience. Web-based training can involve lots of different applications of online instruction and is typically only limited by the learning audience’s typical hardware and software configuration. In this example from the FHWA Civil Rights Risk Mitigation course, the user can interact with the roadmap

elements to learn more about foundations Title VI concepts.

Additionally, web-based training can incorporate gamified elements, including, but not limited to:

- **Theme-based Story/Narrative** – What makes many of today’s most popular technology-based games so engaging and enthralling is their foundation in a theme and story. Gamification-based online courses will have a story/narrative that establishes the learning journey. Leveraging a journey-based theme, the training would include associated challenges, rewards, feedback, and a controlled environment to learn and practice.



- **Graphically-based Menu** – The use of a visual menu that represents the theme or storyline, roots the participant in the learning journey. For example, given that this proposed training is based on project management for construction, a possible visual menu representation would involve a construction-based theme representing various project stages. In this example, various lessons would be represented by the different stages of project

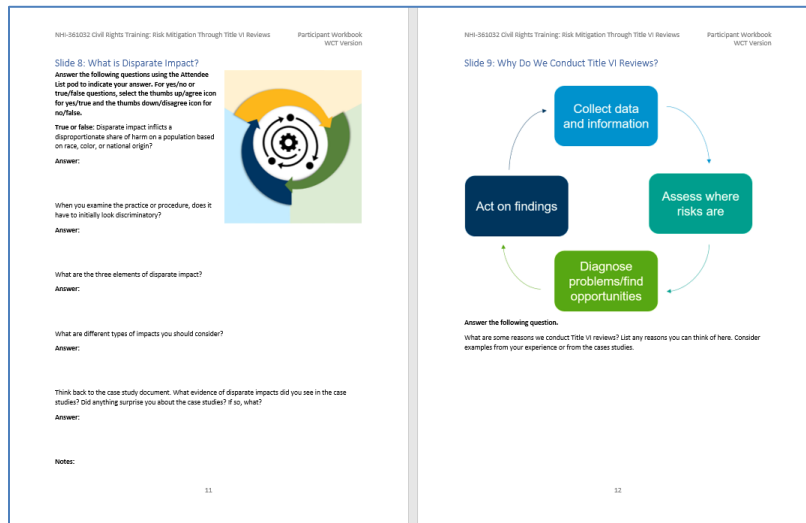
construction.

- **Unlocking, Progress Icons and Rewards** – Leveraging tools such as unlocking lessons and quizzes, strength bars, badges or other progress icons keep participants encouraged and motivated to progress. This journey will have associated challenges, rewards, feedback, and a controlled environment to learn and practice. They will have analytics to show the individual’s progress or how they are faring against the competition.



- **Intermittent Quizzing** – Engaging participants through an intermittent quizzing approach that leverages a trivia or quiz show-style format that leverages tension (sound and time), completion icons/awards and Easter eggs to motivate the participant to successfully complete the activity.”

- **Branching Case Studies with Decision Points** – Online case studies can be presented in several ways including video, article, and website-based examples. Case studies present a real-world situation and write the event up in a factual, non-biased way. In a gamification centered WBT, case studies can be used to develop engaging, branching “choose your own adventure” inspired scenarios in which the participant can choose the more conservative or riskier path. The cases/scenarios written for the scenario-based exercises should examine participants comprehension of various concepts and apply critical thinking techniques to the case. The feedback should include remediation and coaching language to move the participants back toward the ideal path or coach them to return to a particular point to retry their approach.



• **Downloadable PDF – A** downloadable PDF format is an extremely versatile and flexible instructional format, such as a supplemental workbook. Essentially any type of document can be made into a PDF. Another benefit to a PDF download is that this type of stable content can be save and used by participants at any point after the formal learning experience has occurred. PDFs can be interactive using links, fillable form fields, or other elements to help

organize content for learners. Common PDF download types used are case studies, articles, resource or reference information, white papers, article-style activities, and other custom activities (crossword puzzles, word searches, etc.).

Deliverables will include detailed meeting minutes that capture feedback and record decisions as they pertain to the target audience, course content, and course delivery strategies. We would provide a CDP that included terminal and enabling learning outcomes along with a content outline. An additional deliverable will include an updated work plan schedule.

Develop Storyboards

A storyboard is a document that conveys the design intent of each instructional element. Storyboards indicate all aspects a learner encounters and may include visual elements, text, navigation, and narrative or other audio elements for the course. A storyboard can be thought of as a game plan, showing a play-by-play representation of how the training will unfold. All stakeholders agree on this plan before the course is developed in an e-learning tool. Storyboards will contain the following information, at a minimum:

- Project title and screen information, such as the screen title
- Visual and text elements and their treatment (what the learner will see on-screen and how it will be conveyed)
- Script and other relevant audio information (provided in the notes section of the PowerPoint)
- Navigation indications that show how the learner traverses the content, including intended participant interactions, and other navigational indicators (download link or web link)

Working together, the ISDs and WBT developers will develop storyboards for each of the course elements. Storyboards will be provided in an acceptable (Word or PowerPoint) format. Other ancillary instructional files, including exercises/solutions, checklists, case studies, and other materials, will be provided in Microsoft Word or the appropriate Microsoft product format.

The assigned PCHD SMEs will verify that sufficient content is provided to convey the subject and cover the provided learning outcomes properly. The PTG Team will also provide other materials for planned use within the training delivery, such as student exercises, interactions, case studies, and examples. Quality indicators will be checked internally to ensure that all requirements are met.

“The PTG Team has an extremely detailed Quality Assurance process, and they are following through with it.” – NHI Program Manager, referencing the PTG Team’s work at NHI.

To successfully monitor quality assurance and control for PCHD, the PTG Team provides a proven Quality Control Plan (QCP). We have developed and maintained effective QCPs to ensure services are performed in accordance with the PWS. Our ADA Section 508 compliance plan ensures that all agency requirements are met and undergo the proper reviews and approvals to ensure compliance. Our team implements internal review, testing procedures, and document testing with virtual checklists for all our clients to maintain a high standard for products and deliverables. We will modify our QCP methodology to this contract to ensure the accuracy, functionality, and usability of the content. Figure 1 outlines the components of our QCP.

Figure 1: Components of the PTG Team’s QCP

QC Component	Quality Objectives
Scope	Clear service objectives and specifications and streamlined approval processes.
Risk	Detailed and up-to-date program risk assessments and end-to-end risk mitigation.
Schedule	Comprehensive task management and continuous assessment of critical path issues.
Resources	Sufficient staffing to fill task assignments, optimal mapping of resource skills sets to program requirements, and clearly defined roles and responsibilities.
Changes	Transparent processes for updates and modifications and clear management approval processes.
Performance	Efficient analysis of performance data and effective identification and resolution of performance issues.
Communications	Detailed structure and template for program deliverables and strict adherence to program review cycles.

Deliverables include source files for each lesson with content and associated video, resources, attachments, and related files; a Section 508 compliance plan; voice talent and character recommendations; a recommendation for prototype; and a record of comments and dispositions on the comment resolution form.

Develop End-of-Course Assessment (Exam)

Learning evaluation or validation is a vital piece of the training experience because it sheds light on several factors that are important to measure. Those factors include if and to what extent the course met the learner’s needs and the course objectives; the knowledge, skills, and abilities retained by learners; any desirable change to learner performance or ability to complete content-related tasks; and any benefits or return on investment gained by the organization.

Learning evaluation mechanisms can take several different forms, and learning can be validated by a variety of assessment techniques. For this training opportunity, the PTG Team has initially identified the following assessment techniques that can be leveraged during the course:

- Intermittent quizzing throughout the WBT training
- End-of-lesson quizzes that unlock other lessons, Easter eggs, or awards
- Branching scenario-based lessons that allow participants to go down a particular path and receive intervention to coach them down the ideal or correct path

The PTG Team uses Kirkpatrick's Four-Level Training Evaluation Model in determining the effectiveness of training. The team will prepare Level 2 learning assessment questions in parallel with the development of the storyboards. For any Level 2 assessment, PTG will provide a pool of questions that indicate that participants have mastered the learning outcomes.

To ensure assessment validity, the PTG Team has developed a straightforward assessment approach that aligns learning outcomes with assessment questions and cites the location in the course where the assessment question content is covered. The PTG Team will submit assessments for review and record comments and their disposition, as well as any updated assessment items or questions. The approved assessment(s) will be used in the final course materials and will be part of the overall WBT delivery.

Deliverables include a source file of the exam module with associated audio, video, resources, attachments, and related files; a published file that can be uploaded onto the LMS; and a record of comments and dispositions on the comment resolution form.

Develop Prototype (Optional)

Our experience has shown that a prototype example allows for the first initial formative evaluation. This will be representative of how the instructional strategy will be employed in the course and demonstrate the look, feel, and instructional style for the training course. Training prototypes also provide team members with a functioning sample that allows them to visualize graphic direction, view interaction examples, preview learning outcomes and knowledge check direction, read the technical editorial approach, ensure that resources are properly linked, and check on the overall organization of a particular section of the training.

The prototype includes narration, which provides an opportunity to experience the audio content, including narrative style, speed, voice quality, and other narrative considerations. Global changes at the prototype phase are considerably less time- and cost-intensive than later in the design or development process. The prototype is also used for testing with the LMS. The PTG Team is well versed in developing test files and protocols for learning management systems to ensure web-based instruction is properly deployed and functions as designed. Developing files specifically for testing and for the purposes of developing or refining a publishing protocol is an often overlooked but vital part of the course development process.

To ensure that the training functions as designed, we will perform extensive testing and will document a publishing protocol that will be used throughout the project for publishing to the LMS server. During this testing and documentation process, we will develop a plan to resolve any functional issues that are identified in the prototype there maybe one revision included in the scope.

Deliverables include a WBT prototype, including full source files with associated audio, video, resources, attachments, and related files; published files that can be uploaded onto the LMS for review; and a record of comments and dispositions on the comment resolution form. Custom, branded course and player templates will be developed in both Articulate Rise or Storyline.

Develop WBT Alpha

Upon final approval of the storyboards, the PTG Team will develop the training materials following the approved design, PCHD branding as well as requirements for ADA Section 508. The WBT alpha is defined as the entire web-based training course developed to completion

without audio narration. This will involve the development of the interactive web-based training course and the course assessment.

The PTG Team will build alpha-ready training materials. The alpha version will be representative of the final version of the training and will include all final approved content, instructional strategies and activities that are fully operational (including interactive elements such as rollovers, hot spots, pop-ups, interactions, graphics, quiz questions, etc.), and the approved script, as well as course-specific resources or job aids. The WBT alpha allows reviewers to confirm that comments during storyboarding were correctly incorporated and that technically accurate and sufficient content is presented in the training product prior to final programming and professional narration recording. The alpha versions will be published and uploaded to a server designated by PCHD that is representative of the final production server where the files will reside when live. Reviewers will be provided with live links to view the published content for review. We can also use Articulate Review 360 which allows users to add comments and feedback directly into the module presented.

At each submission, PTG Team members will distribute a review form along with the draft materials. Use of the comment form provides traceability of comments from SMEs and PCHD personnel to their resolution or disposition. If needed, a technical review meeting will be conducted after PCHD and the SMEs have had time to review the materials. At the meeting, the PTG team will be prepared to discuss draft course materials and technical issues, clarify questions on content, discuss reference materials to include, and explain any instructional designs or interactive learning techniques built for inclusion in the course. The technical review meeting will be conducted using web-conferencing technologies unless otherwise specified. The team will record comments from those in attendance, incorporate them in the course materials, and provide the revised materials to PCHD. One revision cycle is within this scope.. During development, the PTG Team will acquire all copyright release forms, permissions, and model release forms pertaining to any published materials. We can use a variety of third part media (stock photos/images etc.) and subscription services will allow us to license material for use by Pima County. We would include Pima County branding where it is appropriate. We will guarantee all photos, videos, and screenshots of the materials are owned by PCHD for marketing purposes at the end of the project.

Deliverables include all source files with associated content for each lesson, including video, resources, attachments, and related files; a published production file that can be uploaded for review; and a record of comments and dispositions on a comment resolution form.

Conduct Pilot (Beta Version)

A pilot is a user test of the online course before it is fully launched. It is an opportunity to test the course instructional approach in a real-world condition with a smaller group of users to gather information on the technology, directions, content, activities, and the whole user experience to fix any problems before the course is formally launched. A pilot should have two main characteristics. First, it should be done before the full launch of an online program. Second, the evaluation should be formative in nature, not summative. The aim of a pilot is to identify what works for the user and what does not, so designers can undertake evidence-based corrective actions to ensure a successful teaching and learning experience for the WBT. The most important aspect is that the pilot has a formative function, informing designers about what design and navigation elements work well, work poorly, or do not work. These elements are all inclusive, meaning the WBT modules, job aids, and assessments. Pilots also serve as an early warning system for the technology. Through pilots, we may discover that content, activities, and assessments are too complex (or too simplistic), not relevant, or not useful for our audience,

downloading content is not straightforward or that directions are too unclear for the learner to know what to do.

With the final approval of the WBT alpha, the PTG Team will work with voiceover professionals to record the narration and prepare a pilot-ready (beta) version of the training. The pilot tests will provide an opportunity to seek feedback on the training from the target audience (i.e., potential students) and validate the training both functionally and instructionally. The PTG Team will work with PCHD to find and select eager pilot participants who would be willing to participate in this large pilot delivery. The team understands that selection criteria for pilot participants are critical for the pilot's success: They must represent the target audience. Experience with the development tools and server also plays a key role in the success of a web-based delivery content and resource materials.

The PTG Team will provide a draft email for PCHD approval that will be distributed to pilot participants, along with a pilot review. The review forms prompt users to provide feedback and collect participant data about the length of time taken to complete each instructional component. These data are captured to determine official professional development hours (PDHs) that can be offered. After the pilot, PTG will prepare a pilot report and submit it to PCHD. The report will document participant names, pilot feedback, time-for-completion data, proposed changes to the module components, and assessment (exam) analysis. Given previous projects, we expect minimal changes.

Deliverables will include a written pilot report with an overview of pilot methodology, list of pilot participants, participant and course completion results, participant exam scores with pass/fail data, participant evaluations, exam analysis, pilot comments and resolutions, and recommendations.

Final Course Materials

Following the pilot, the PTG Team will compile notes and comments recorded at the pilot from participants into a disposition report with proposed resolutions for each actionable comment. The PTG Team will submit the disposition report to PCHD for review and approval. Once the changes to be made as indicated in the disposition report are agreed upon, the PTG Team will make final updates to the course materials which includes the WBT and assessment. The PTG Team will add any final updates to the training materials and will support the PCHD during the uploading and testing of the modules on the LMS until the approval is given. Our proposed team members are adept in multiple LMS products and work with over 30 state DOTs to load trainings onto LMSs. The team will review feedback from testing and resolve any technical issues, functional problems, or bugs discovered during this testing process. The team will document all issues and resolutions for tracking purposes.

The PCHD will provide the PTG Team with either written approval of delivery of final materials or information about any required corrections. Any corrections will be addressed by the team typically within 5 FWDs. The team understands the files are not final until they are fully functional in the LMS.

Deliverables will consist of a final version of the WBT modules and exam(s), including all Word, PowerPoint, published Adobe Presenter (or other approved software) zip SCORM files, and other source files with any associated content for each lesson (including video, resources, attachments, and related files). A final ADA Section 508 compliance testing report will also be delivered.

Staffing

The table below summarizes each team member's expertise, years of experience (service), their agency (subcontractor), and brief description of the experience and examples.

Expertise	Yrs. Exp	Comp	Experience and Examples
Project Manager	30	PTG	<ul style="list-style-type: none"> • 30 Years of Project Management Experience including instructional design, web-based training development, media production and gamification development. • Expert in 508 compliance, Adobe Connect and SCORM administration • Example work of NHI courses can be found at NHI.FHWA.DOT.GOV using this link filter
Instructional Systems Designer	12	ECC	<ul style="list-style-type: none"> • Senior ISD with years of NHI experience • Designed multiple delivery formats in multiple instruction formats (including gamification) • Designed 100+ courses for AASHTO • Experienced in 508 compliance • Example Work: Virtual Bridge Inspection and the NHI course listed
Certified Trusted Tester for Section 508 of the Rehabilitation Act of 1973 (Learning Management Specialist)	24	PTG 1099 Sub	<ul style="list-style-type: none"> • Holds Certified Trusted Tester Certification for 508 compliance • Extensive accessibility compliance experience including with several technologies (below in resume) • Over 20 years of experience in Web design and development
Learning Management Specialist/ISD	25	ECC	<ul style="list-style-type: none"> • Seasoned Project Manager • Completed several FHWA/NHI projects • Expert in Adobe Connect functionality • Delivered multiple delivery formats in multiple instruction formats over years (including gamification) • Example Work: NHI - Safe Transportation for Every Pedestrian STEP series
Gamification/ Application Development (Graphics Designer/Media Specialist)	10	PTG	<ul style="list-style-type: none"> • Worked with FHWA/NHI on large projects • Experienced in designing gamification style training developments • Experienced in high-end training graphic designs • Built animations/interactions for several FHWA/NHI courses (including gamification) • Proficient in several WBT development tools (including Articulate and Captivate) • Experienced Adobe Connect and NHI development specifications for Connect • Example work: UDOT - Construction Inspection of Mechanically Stabilized Earth (MSE) Walls
Technical Writer (ISD)	10	PTG	<ul style="list-style-type: none"> • Authored/scripted several FHWA/NHI courses • Authored/scripted FHWA videos • Authored gamification style courses • Familiar with NHI Style and General Standards Guide • Example work: FHWA Every Day Counts (EDC) Education Connection Videos - High School and Vocational examples

Cost Proposal

This unit pricing is found in the Offer Agreement section 7:

UNIT PRICES (Net 30-day Payment Terms)

ITEM #	ITEM NAME Items to include and satisfy all Solicitation & Offer Agreement requirements, General & Item Specifications	ESTIMATED ANNUAL USAGE QUANTITY	UOM	UNIT PRICE \$	EXTENDED AMOUNT \$
1	E-learning course using Articulate software; 30 min	50	Half-Hour	\$8,750.90	\$437,545
2	E-learning course using Articulate software; 60 min	See Note	Hour	\$13,126.35	See Note
3	E-learning course using Articulate software; 15 min	See Note	Quarter-Hour	\$7,438.27	See Note
FOB Destination/Unloaded; include cost of freight in unit price. Although County will pay taxes IF applicable, do NOT include sales tax in unit price.				TOTAL PROPOSED COST	\$437,545

*Note: 30 minutes is the expected length of most courses. If shorter or longer courses are requested, the EAU would remain the same – a total of 1,500 minutes of course time.

Breakdown of Tasks	Total 30 min class (estimated)	Total 60 min class (estimated)	Total 15 min class (estimated)
Kickoff Meeting	340.58	510.87	289.49
Curriculum Planning Meeting	550.54	825.81	467.96
Course Design Plans	970.46	1,455.69	824.89
Build Template/Prototype	907.70	1,361.55	771.55
Develop Storyboards	1,369.46	2,054.19	1,164.04
End-of-Course Assessments	304.48	456.72	258.81
Develop WBT Alpha Version	2,703.58	4,055.37	2,298.04
Update/Soft Launch Beta Version	1,604.10	2,406.15	1,363.49
Total	8,750.90	13,126.35	7,438.27

Sustainability

By using the electronic-delivery first philosophy, PTG practices sustainability by reducing the use of paper, toner, and other disposable items. The use of video conferencing and virtual offices keeps the impact of travel and commuting on the environment to a minimum.

Appendix A: Work Samples

1. FHWA – Development of Training Materials for the Local and Tribal Transportation Community

We have built new 17 courses that add up to over 86 instructional hours.

Project Name:		Development of Training Materials for the Local and Tribal Transportation Community	
Description	PTG provides training development and delivery services to local, Tribal, and Federal land management agencies. PTG evaluates and assesses existing course content and provides recommended solutions to either modify the existing course or develop the course in an alternate format to be more effective. PTG delivers web-based training (WBT), web conference training (WCT), video conference training (VCT), flipped classroom training, new technologies such as mobile apps and virtual world delivery, and new evolving training delivery platforms.		
	PTG’s project deliverables and objectives include: <ul style="list-style-type: none">Identifying innovative solutions to deliver training to local and Tribal communities.Assessing existing course content and recommending solutions to either modify or develop new courses.Providing recommendations on the best approach for adapting, delivering, and altering existing course content to standardize course material and delivery methods to meet a broad range of audiences.Providing services in support of training in the core areas of the Local Technical Assistance Program (LTAP) and Tribal Technical Assistance Program (TTAP).Updating and/or developing training curriculum, course content, and training modules for the delivery of instructor-led training (ILT), WBT, WCT, VCT, and flipped classroom training.Developing accessible training for the local and Tribal communities located in areas facing geographic challenges (i.e., lack of internet access, lack of cell phone bandwidth, etc.).		
Role	Prime: PTG International Subcontractor: E-Content Consulting		
Courses and Instructional Hours			Instructional Hours
	Course Name		
	Gravel Roads Construction and Maintenance		5
	Geosynthetic Reinforced Soil - Integrated Bridge System (GRS-IBS)		15
	Safe Transportation for Every Pedestrian (STEP)		6
	Project Bundling Series - Bridge Bundling		9
	Construction Inspection of Rockeries		3.5

	Value Capture	8
	Gravel Roads Condition Assessment	3.5
	Strategies for Effective Management of Gravel Roads	3
	Motor Grader Operator	4.5
	Targeted Overlay Pavement Solutions (TOPS)	3.5
	Integrating Project Bundling	3.5
	Bridge Maintenance	3.5
	Installation & Maintenance of Erosion Control Devices	3.5
	Elevation and Grade Instrument Use	3
	Pipe Installation & Maintenance	3.5
	Soils and Foundations	4
	Asphalt Materials and Paving Mixtures	4.5
	Total Instructional Hours	86.5
Government Agency Client	Federal Highway Administration	
Period of Performance	12/29/2017 – 06/01/2022	
Current Status	Complete	
Team Composition and Roles	PTG and ECC collaborate on Task Order deliveries, with PTG doing at least 51% of the work. PTG provides program management, instructional systems design, virtual programming, training evaluation, instructional production, voice-over, and technical writing resources to projects. ECC provides project management, instructional systems design, and learning management system (LMS) support resources.	
Metrics Used to Track Performance and Growth	PTG and ECC completed all course final deliverables, which included a rigorous pilot with true pilot participants for each one, custom questions to verify that materials perform at the high level needed for effective trainings delivered to both LTAP and TTAP communities, and Kirkpatrick Level 1 and Level 2 evaluations. PTG is continuing the partnership with this client to monitor the needs for Level 1 and Level 2 evaluations, providing ongoing support.	
How Quality Scope was Delivered on Time and Within Budget	PTG provides detailed Microsoft Project work plan schedules that are updated on a monthly basis. In addition, PTG submits a detailed monthly status report that highlights milestone dates, tasks accomplished, tasks planned for the upcoming month, and issues/risks that may have been identified. Finally, PTG meets with the contracting officer representative (COR) on a weekly basis in order to keep production and content reviews moving at a rapid pace. Having an updated schedule and monthly status report plays a key role in keeping deadlines and staying within proposed budgets.	

2. AASHTO/TC3 - Development of TC3 Distance Learning Program, Maintenance of Learning Management System (LMS), and Overall User Support

We have converted and built new 250+ courses since 2014 that add up to over 550+ instructional hours.

Description:

- E-Content Consulting provides comprehensive, end-to-end curriculum design and development services, strategic planning, curriculum gap analysis, learning management system (LMS) support, and other program support to the TC3.
- E-Content Consulting team members have long-served TC3. Kevin Monaghan initiated the effort in 2006 with a needs analysis based upon existing training curriculum for the competencies of the disciplines defined in the program. Based upon the most pressing needs identified by the States through a needs analysis, Kevin Monaghan and Chris Anderson identify training development opportunities and prioritize efforts accordingly. Instructional systems designers (ISDs) Emily Lloyd and Meredith Perkins work with technical panels to develop course outlines, course learning outcomes, preliminary design plans, and storyboards for approval by the technical panel. These materials include innovative design strategies aimed to engage adult learners and adhere to adult learning principles. E-learning developers Javier Machado and Jason White then develop web-based training (WBT) materials and other related course materials, incorporating creative and beautiful graphic designs and intuitive engagement pieces that clearly and accurately convey content while encouraging learners to be active participants in their instruction. Once complete, TC3 courses are launched on the AASHTO Training Store and distributed to States participating in the TC3 Training State Sharing Program. This requires publishing courses in multiple formats to conform to the LMS requirements of AASHTO's Maestro LMS and those of TC3's State partners.
- In addition to web-based instruction, E-Content Consulting is developing tutorials, videos, mobile job aides, and other instructional content to support TC3. E-Content Consulting is also researching and piloting several instructional technology solutions, including the use of simulations, 3D models, augmented reality, virtual reality, and other exploratory learning products for use by TC3.
- Under the current agreement, E-Content Consulting is developing 27 courses representing 50 instructional hours. Since 2006, the team has developed 135+ online courses and other learning products.
- In 2015, E-Content Consulting team members worked with AASHTO Bookstore developers to configure an AASHTO Training Store and integrated SumTotal Maestro LMS, including writing functional requirements, designing a registration profile and process, designing and configuring LMS look/feel, uploading the full TC3 library to the system, and building and integrating ancillary course items including course certificates and a Level 1 Evaluation. The system went from a commercial off-the-shelf (COTS) shell to a fully functional system in only 8 months. E-Content Consulting currently provides ongoing support for the LMS, including managing user inquiries,

troubleshooting any user issues, reporting, and enhancing the system as new features becomes available and new requirements emerge from AASHTO and TC3.

- E-Content Consulting team members also mapped all TC3 courses to the TC3 course matrices, ensuring all courses are mapped to a category, sub-category, and disciplines as appropriate, to support management of the overall TC3 curriculum.

Work Orders:

Work Order #01 – Monthly Services/Reporting

- House the TC3 curriculum course file inventory
- Coordinate with NHI and State File Sharing Program partners to transmit updated and newly developed course files
- Initiate quarterly reporting of future course training records
- Prepare and submit quarterly course participation reports to TC3 Executive Board
- Manage the administration of requests within the file sharing program

Work Order #02 – Manage File Sharing Program

- Manage the process of responding to State DOT requests for TC3 file sharing
 - Convert TC3 course modules to an acceptable configuration to effectively run on the individual state LMSs
 - Publish all conversion files for the requested modules and forward to the participating States for initial uploads
 - Technical support as necessary
- Monthly status reports
- Coordinates quarterly reporting of course use for each State partner

Work Order #05 – LMS Support and Enhancements


- LMS customer support
- Continual assessment, planning, and implementation of LMS enhancements
- Coordination with Maestro staff, AASHTO staff, and AASHTO Bookstore developers
- Identify, develop, and build LMS reporting functionality as needed

Work Orders #09–11 – Complete New Course Hours

- Utilize the TC3 course development process to complete new hours of course content and develop the high-level design plan for the identified courses.
- Build the modules in accordance with the TC3 style guide and with a new template
- Utilize the TC3 course development teams and the SME resources to develop and confirm course content
- Develop web-based trainings for 30+ instructional hours in construction, maintenance, and materials

Work Order 12 – Course Conversions/Mobile App Job Aids


- Utilize the TC3 course development process to convert 20 hours of course content
- Convert the modules in accordance with the TC3 style guide and with a new template
- Utilize the TC3 course development teams and the SME resources to confirm course content
- E-Construction Mobile App (WBT and Mobile App)
- 3D Engineered Models for Construction conversion
- Develop 25 Mobile Job Aids for TC3 Mobile App



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Bridge Construction Inspection: Inspector's Safety

Outline
Notes
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Slide Notes

Construction companies are required to follow OSHA regulations and the ANSI standards they reference. State governments do not fall under OSHA's jurisdiction. However, "SAFETY" is OSHA's business and OSHA is the authority on best practices for safety. Considering the close working relationship States must maintain with construction companies, you should be familiar with best management safety practices and your State's safety requirements. It is a benefit to everyone on the project to make safety a priority and follow the same safety practices.

This module will help you understand some of OSHA's rules. Throughout the training you will hear the word "shall" several times. Shall is the word used by OSHA to indicate a mandatory rule.

If you would like to learn more on OSHA and ANSI policies and regulations, please visit OSHA at www.osha.gov and ANSI at www.ansi.org.

Image description: Tractor and various images.

24 Minutes 59 Seconds Remaining

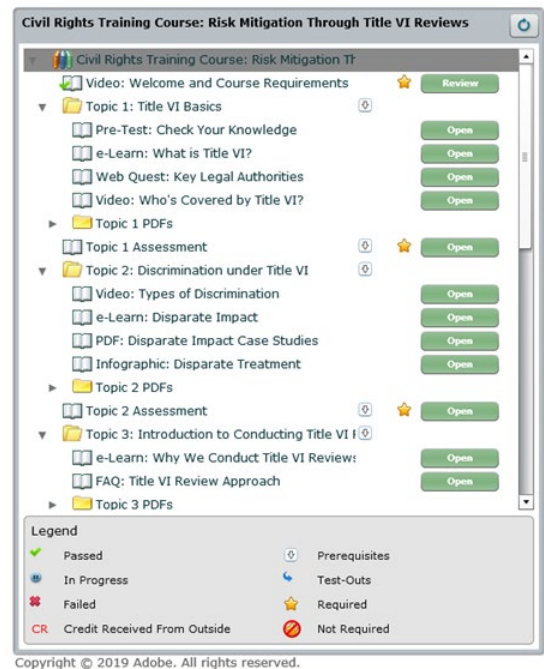
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3. National Highway Institute (NHI)

We have built over **40 instructional hours** of new training in the past few years.

The PTG proposed team members have worked on several recent NHI course developments. They are:

- NHI-361032** – The PTG Team revised and updated the NHI civil rights training course “Risk Mitigation Through Title VI Reviews.” The goal of the training is to provide participants with strong foundational knowledge in conducting Title VI reviews. This includes the types of discrimination they are evaluating, how Title VI relates to transportation programs and projects, and, from a practical standpoint, how to collect and analyze data to determine if a Title VI violation has occurred. The revised instructional design strategy is a blended course that combines digital delivery (asynchronous) prework followed by a 6-hour, instructor-led workshop-style training. The PTG Team recommended the flipped-classroom design used in the revision of the course. This approach creates an active learning experience that capitalizes on participants' intrinsic motivation to become experts in their job tasks while also providing support to participants as they learn the intricate, multifaceted skills and abilities required to conduct and evaluate these complex Title VI reviews. In addition, the use of a wide variety of instructional strategies (including some gamification elements), such as [pre-tests](#), [e-learning](#)s, [web quests](#), animated explainer videos, real-world case studies, tutorial videos with expert hosts, and web demonstrations, engages participants and is designed to bring out the curious learner in each person. The PTG team worked closely with the NHI team to develop prototypes to test functionality and verify the proposed delivery solution. This implementation requires the PTG Team's deep understanding of the Adobe Connect platform and its potential capabilities.
- NHI-135096** – PTG proposed developers are working on the current WBT titled *Roadway Interactions with Rivers and Floodplains*. The WBT is four hours of training material with a focus on many basics of fluvial geomorphology. Primary course topics include concepts and common terminology used to describe and discuss rivers and their forms (e.g., planform, profile, and cross-section shapes, features, and functions); how river forms and processes relate to slope, boundary material, and other variables; channel evolution and dynamic stability; incipient motion and modes of sediment transport; and bedforms. The WBT used engaging visuals and audio and an enthusiastic and friendly tone. Our team of instructional developers are adept in designing creative and innovative learning elements, including advanced knowledge of creating content that fosters engagement, feels authentic to learners, and supports a customized user experience. Our training solution included interaction Planform gaming activities and [exercises](#) that allowed the participant to have an edu-taining experience. We worked closely with FHWA public affairs 508 staff to also build accessible alternatives to be 508 compliant. Finally, we included a comprehensive end-of-course assessment that ties back directly to the course learning outcomes.
- NHI-133129** – PTG proposed developers are working on the current WBT titled *Introduction to ATSPM and Application Examples*. The course design reflected the ATSPM Data Application Hierarchy first introduced by Day et al. 2015, and henceforth adapted by this team in the NCHRP 03-122 guidance on signal performance measures. ATSPM



applications range from diagnosing basic signal communications and detection challenges, to evaluation of local timing, to corridor-based assessments on coordination and other advanced applications. For this course, the PTG Team proposed a flexible and adaptable course structure. The instructional elements were developed by a team of highly qualified instructional systems designers and technologists working alongside production and programming staff, graphic artists, and content editors that have wide-ranging experience in developing learning products. Our experience in using [innovative learning technologies](#) to create high-quality instruction that learners both enjoy using and learn quickly from to aid in the learner's ability to practically apply their new knowledge in the context of real-world situations. Instructional elements were customized to properly support the target audience's unique needs and were delivered in various formats that meet modern learners' expectations.

- Other training developments in the works for NHI include:
 - **NHI-380073** – Evaluating Safety, Operations, and Engineering of Interchange Alternatives
 - **NHI-380079** – Overview of Roadside Safety
 - **NHI-133115** – Advanced Work Zone Management and Design
 - **NHI-380129** – Performance-Based Flexibility in Geometric Design
 - **NHI-139013** – Freight and Land Use

The PTG Team has received feedback from NHI that “everything has been on time or early” and our team members “provide extra value by proposing and executing mechanisms that allow for better learner engagement, comprehension, transfer of learning...and those things that make training effective.”

Appendix B: Resumes

Tom Tatem

Project Manager

Organization: PTG International

Highest Degree Completed: Masters, Instructional Systems Technology, Indiana University

Years of Relevant Experience: 30

Basis for Selection

Tom Tatem is a Learning and Development professional with experience overseeing a nationwide training program, gathering training requirements, managing training development, and monitoring training programs. Provides direct instructional design and project management services. Ensures training dollars are spent effectively and appropriately and that projects fulfill client expectations, achieve quality assurance standards, and meet budgetary constraints.

Experience Relevant to Statement of Work

Manager of Training Solutions for PTG International, 2021-Present. Collaborate with team members to expand existing programs and establish new training interventions. Work in partnership with subject matter experts to develop instructional strategies, learning experiences, and to identify course learning objectives. Project management of curriculum and course development projects.

Team Lead/Senior Instructional Systems Designer for Infotrendusa and ADNET Systems, 2012-2021. Client: Federal Highway Administration (FHWA), National Highway Institute (NHI). Consulted with managers, customers, and stakeholders in the design and implementation of training strategies and training needs assessments. Gathered training requirements, monitored training development, and managed delivery of training and training evaluation. Recommended rapid-development learning and training tools.

Senior Consultant for Instructional Design/Training Technologies, 2011-2012. Led team for the science, technology, engineering, and mathematics program for elementary youth under a Department of Defense contract; advised on current training industry trends and worked with senior leaders on customer relationship management (Job Performance Systems). Provided contract instructional designer services for Xyleme content management system for courseware updates and revisions (ESI-International).

Director of Federal Training Services for KeyBridge Technologies, 2009-2011. Handled overall management of training and eLearning Federal contracts (Department of Labor, Federal Aviation Administration, Transportation Security Agency, U.S. Army, and U.S. Air Force), acquisition of new programs for custom training services, customer service, client relationships, and supervision of development staff.

Vice President for Federal Systems for Regis Learning Solutions/TechniquesORG, 2006-2009.

Program manager for all Office of Personnel Management/Training Management Assistance (TMA) programs as well as other Federal projects and Federal contract vehicles. Facilitated needs assessments and instructional design. Planned and managed the design, development, and production of training, multimedia and web-based programs for Federal contract vehicles. Researched and consulted to clients on the application of emerging technologies to training solutions. Created and managed detailed project plans; managed program budgets, project scope (including change-order control process), and customer service and user feedback for clients and stakeholders.

Emily A. Lloyd

Instructional Systems Designer

Organization: E-Content Consulting

Highest Degree Completed: MEd, Curriculum and Instruction, Instructional Technology, George Mason University

Years of Relevant Experience: 15

Basis for Selection

Emily Lloyd is an instructional systems designer with extensive experience in training and curriculum analysis, instructional design and development, and training evaluation. For the past 15 years, she has been involved in supporting clients by creating highly-engaging, learner-centered instruction (ILT, VILT, and WBTs).

Ms. Lloyd has experience with a wide-variety of complex instructional design-related projects. These experiences enabled her to approach each new task with a focused and comprehensive strategy for designing and developing training. She has worked with subject matter experts in a number of different fields and knows how to quickly adapt her thinking and understanding to different topics across a number of different industries. Ms. Lloyd has a knack for understanding current design trends and is always researching and employing new technological capabilities into the courses she develops. Ms. Lloyd is not only experienced with training design and development, she is also well-versed in training conversion and redevelopment in virtual online format (VILT and WBTs).

Ms. Lloyd also has experience working with a wide range of learning management systems, including a recent project where, in only five months, she planned, designed, implemented, and deployed an integrated system. The system not only hosts all of the client's web-based courseware, but provides an automated platform for users to register for, purchase, launch, and manage their training. Now that the system is successfully live, Ms. Lloyd administers the system and manages any requested system growth, new requirements, new functionalities, ad hoc reporting, and additional capabilities.

Experience Relevant to Statement of Work

Senior Instructional Designer, Risk Mitigation Through Title VI Reviews Course, National Highway Institute/Federal Highway Administration, 2019–present. Work closely with Subject Matter Experts (SMEs) to design and develop an innovative, learner-centric blended course. Develop 30 asynchronous micro-learning that participants can complete before attending a one-day virtual in-person workshop (VILT). Micro-learning are in a variety of different formats including animated explainer videos, expert explainer videos, web demonstration videos, interactive infographics, downloadable PDF case studies, and highly-stylized web-based trainings that each have a different theme and concept design to hold learners interest and keep engagement high. Course design is such that learners guide their own learning. Learners have the option of taking micro-learning in any order and may skip topics altogether and advance to the assessment if they wish. Required course elements are asynchronous assessments and homework, and the in-person workshop. Course culminates at the workshop with the final assessment, where participants conduct an actual Title VI program review. Work completed

during this assessment is directly applicable to participants' job tasks, to the point where it can be included in the learner's annual accomplishments.

Senior Instructional Designer, Support to Noblis, ITS Professional Capacity Building (PCB) Crosscutting Programmatic Support, Federal Highway Administration (FHWA), 2020 – present. In support of the Noblis team, provided instructional design consulting services for the ITS PCB program. Designed and developed multiple web conference trainings for delivery by the Intelligent Transportation Systems (ITS) America for their members. As part of this effort, converted instruction originally intended for in-person delivery to virtual classroom delivery. Designed and developed an engaging breakout scenario-based case study activity. Created the Adobe Connect virtual classroom including building all layouts, poll pods, notes pods, interactive whiteboard pods, and other presentation and engagement pods. Facilitated the virtual conferences by providing introductory and general support services, administering the room activities, and providing technical user support. Designed and storyboarded a series of microlearnings to engage participants in the core competencies of content central to the PCB's program area. Working with subject matter experts (SMEs) to ensure content is technically accurate and learner-centric.

Security Forces Journeyman-Level E-Learning Course (J-eLC), United States Air Force, 2018-2019. Updated the design and approach for the Security Forces (SF) Journeyman Career Development Course (CDC) from a text- and illustration-based format to more versatile approach, using highly interactive and engaging design techniques. A critical goal of this project was to design an exemplar training product that demonstrates the expanded realm of possibilities for learning content delivered via the Air Force Learning Services Ecosystem (AFLSE) and stimulates all Air Force career fields to consider options to improve the designs of their learning products. Conducted a large-scale front-end analysis (FEA) of the existing instructional situation, provided four potential courses of action (COAs) for the Air Force to choose in updating and converting the existing CDC, and created a comprehensive updated course design in an Instructional Media Design Package (IMDP) document and corresponding working prototype.

Senior Instructional Designer, Federal Highway Administration (FHWA), Highway Materials Engineering Course (HMEC), 2013–2018. Served as the Senior Instructional Designer for the re-development of the HMEC, which consists of 181 hours of training. Worked with a wide variety of SMEs, industry groups, and FHWA personnel to synthesize content into an instructionally sound format. Converted approximately 65 hours of instructor-led training to dynamic web-based asynchronous and synchronous formats (ILT and VILT) using Adobe Presenter and Adobe Connect, with a focus on learner-centered training and insights into various factors that impact the best approach to delivering training. Updated materials post-pilot to ensure that both expert feedback and participant comments were used to improve the training. Created instructor guides, facilitator guides, participant workbooks, lab manuals, ancillary course materials, and presentation materials. Supported and facilitated the delivery of synchronous web-based modules, delivered using Adobe Connect.

Senior Instructional Designer, AASHTO support for TC3 Technical Service Program, 2016–present. Design new courses and determine where they fit in the overall TC3 curriculum. Work with Subject Matter Experts across a variety of different disciplines and program areas. Integrate stories, scenarios, case studies, complex graphics, videos, and other elements into courses. Develop learning modules from storyboards in compliance with SCORM standards. Convert

web-based training into responsive design for mobile learning. Administer SumTotal Maestro Learning Management System (LMS).

Senior Instructional Designer, Utah Department of Transportation (UDOT), 2018 – 2019.

Researched and analyzed various topics for a brand-new station supervisor course which included meeting with subject matter experts in various departments and disciplines, reviewing existing presentations and other documents/materials, and asking questions to generate instructional material. Drafted a detailed design plan template for use on this and other courses for UDOT that outline course requirements and other details for new courses at UDOT. Created a design plan for the station supervisor course that included a content map, showing the traceability between course objectives, content, learning strategies, existing resources, and other pertinent notes and considerations for design. Designed storyboards for each standalone module that integrated stories, scenarios, case studies, graphics, videos, and other elements. Programed courses using Articulate Storyline. Implemented courses on the UDOT Saba Learning Management System using a custom SCORM packager to ensure courses functioned as expected.

Senior Instructional Designer, Constructing PCC Pavement Preservation Treatments Web-based Training (WBT), Federal Highway Administration, 2016–2019. Designed and developed five highly engaging, media-rich 90-minute web-based trainings for topics in Full-Depth Repair, Partial-Depth Repair, Diamond Grinding, Dowel Bar Retrofit and Cross-Stitching, and Joint Sealing. Worked with SMEs employ a number of scenario-based reviews that allow for contextualized, real-world examples. Currently converting all five courses to a Spanish version.

Connected Vehicle 102 Workshop, Noblis, 2015–2016. Analyzed existing draft materials and created a draft design plan. Integrated videos, animations, discussions, and other interactions to ensure participation and active learning. Drafted the presentation and ancillary materials, including a participant worksheet for group activities. Designed and developed a Train-the-Trainer session and assisted in multiple deliveries of this session.

Education

Degree	Date Received	Institution
MEd, Curriculum and Instruction, Instructional Technology	2009	George Mason University
B.M., Music Education	2004	University of Wisconsin-Madison

Relevant Employment History

Dates	Position(s)	Organization	Address
2011 – Present	Senior Instructional Designer	E-Content Consulting	1040 S. Cochran Los Angeles, CA 90019
2011 – 2019	Senior Instructional Designer	Harpers Enterprise, Inc.	950 N. Washington St., Suite 239 Alexandria, VA 22314
2011 – 2013	Instructional Designer	Sevatec	2815 Old Lee Highway Fairfax, VA 22031

2010 – 2011	Industry Specialist	General Services Administration (GSA)	1800 F. Street NW Washington, D.C.
2006 – 2010	Senior Instructional Designer	ICF International	9300 Lee Highway Fairfax, VA 22031

MEREDITH PERKINS LABOR CATEGORY: INSTRUCTIONAL SYSTEMS DESIGNER

Meredith Perkins is a senior instructional systems designer (ISD) and project manager with more than 13 years of specialized experience in instructional design consulting services for classroom, web-based, computer-based courseware and innovative learning technologies including virtual worlds, mobile/tablet applications, and social media.

She is a recognized expert in her field and has been featured on the Dorobek Insider Program and as a workshop leader at the Federal Consortium for Virtual Worlds and the National Transportation Training Directors Conference. Perkins strives to deliver creative and innovative training solutions for clients, while employing a practical and problem-solving approach to educating professional adults. She provides research, guidance, and idea generation in regards to cutting-edge training solutions: conceptualizing, planning, and managing the instructional design and development of a national award-winning, half-million dollar development of the Virtual Bridge Inspection, a 3D computer-based training. Additionally, Perkins has led various online virtual events that leverage technologies such as virtual worlds and streaming video content, including a five-day Construction and Project Management Virtual Workshop and a two-day Virtual Foundation Expo.

Academic Background	<ul style="list-style-type: none"> M.E.D, Curriculum and Instruction – Instructional Technology Development and Design, George Mason University BBA, Decision and Information Sciences, University of Florida 	Experience: Instructional Design and Training	13 years
		Experience: Virtual Worlds and Simulations	9 years
		Security Clearance	FHWA Contractor Badge

EXPERIENCE

2016–Present E-Content Consulting

Senior Instructional Designer – Client: Federal Highway Administration (FHWA) Center for Local Aid Support Office of Innovative Program Delivery (OIPD)

- Created engaging storyboards for web-based training for the Local Technical Assistance Program (LTAP) and Tribal Technical Assistance Program (TTAP)
- Work with Subject Matter Experts (SMEs) to design new courses
- Document course approach and design in a comprehensive and detailed design plan
- Create interactive learning objectives to engage participants
- Integrate stories, scenarios, case studies, complex graphics, videos, and other elements into web-based training courses

Senior Instructional Designer – Client: American Association of State Highway and Transportation Officials (AASHTO) TC3

- Work with Subject Matter Experts (SMEs) to design new courses and determine where they fit in the overall TC3 curriculum
- Work with SMEs and production team to synthesize content into an instructionally sound format
- Document course approach and design in a comprehensive and detailed design plan
- Create interactive learning objectives to engage participants

- Integrate stories, scenarios, case studies, complex graphics, videos, and other elements into web-based training courses
- Develop learning modules from storyboards in compliance with SCORM standards for a wide range of audiences and in diverse subject matter from project inception through evaluation and maintenance
- Implement client/SME feedback and verified content updates for quality assurance and stability

2013–2016

Harpers Enterprise, Inc.

Account Manager and Senior Instructional Designer – Client: Federal Highway Administration (FHWA), Every Day Counts (EDC) Education Connection Videos

- Serving as the lead for this project, creating four videos for different audiences with the goal of showing an emerging workforce the opportunities available to them in the highway transportation industry
- Created design plans for each target audience, including age-appropriate learning outcomes and video delivery strategies
- Work with video designer and editor to create age-appropriate scripts and storyboards for a series of four unique videos, each ranging from approximately 6–9 minutes in length
- Work with K-Doctoral education expert to design and draft lesson plans to deliver the videos in a classroom setting as part of robust and engaging full-length (50+ minute) lessons
- Work with client to collect SME input in collaborative and cyclical review cycles
- Developed and regularly update detailed project schedule; track and write monthly progress reports

Account Manager and Senior Instructional Designer – Client: Iowa State, Virtual Workshops and Conferences/ON24

- Acting account manager and senior instructional designer for the Internal and Replaceable PT Models projects - 3D modeling and animation projects, in which three 3D bridge models were developed and various construction and functionality related animations were developed to model post-tensioning issues
- Acting account manager and senior instructional designer for the Construction and Project Management Virtual Workshop, a five-day virtual workshop held March 7–11, 2016 featuring 55 presentation webcasts (75% as pre-recorded video presentations) and 54 scheduled post-presentation chat sessions, with over 34 presenters and 300 registrants, all delivered via the On24 Virtual Event Platform
- Responsibilities included the development of multiple job-aids, presentation reviews and coordination, filming via webcams and at DOT HQ, presenter and team training, and simu-live webcast building, testing and integration with the virtual event platform
- Led the development of the FHWA On24 Virtual Event platform and the Elite Webcast console, including the selection of templates, images, and overall functionality
- Served as account manager and senior instructional designer, in support of the PTI Workshop Streaming Video pilot, a two-day pilot event leveraging the FHWA On24 Virtual Event platform, Elite Webcast software, and live streaming video
- Serving as the Senior Instructional Designer in the analysis, design, and development of a variety of virtual training technologies for the FHWA

Instructional Systems Designer – Client: Federal Highway Administration (FHWA) Highway Materials Engineering Course (HMEC)

- Serving as Instructional Systems Designer for the re-development of the HMEC, which consists of 181 hours of training

- Worked with a wide variety of SMEs, industry groups, and FHWA personnel to synthesize content into an instructionally sound format
- Aided the team in moving much of the previous instructor-led training to dynamic web-based asynchronous and synchronous formats with a focus on learner-centered training and insights into various factors that impact the best approach to delivering training

2013–2015

Mortgage Bankers Association

Senior Instructional Systems Designer (Senior Consultant) – National Highway Institute (NHI)

- Provided coordination, direction, and guidance for needs analysis, design, development, implementation and evaluation (ADDIE) processes related to web-based training
- Led the update and re-launch of 14 web-based training courses related to the residential underwriting course library and designation, with approximately 15 hours of content per course. Curriculum materials include: branching webpage structure, 508 and SCORM compliant design, practice activities and virtual field trips, interactive graphics, audio clips, and assessments for delivery via Blackboard

2008–2013

Sevatec, Inc.

Senior Instructional Systems Designer (Senior Consultant) – National Highway Institute (NHI)

- Provided coordination, direction and guidance for needs analysis, design, development, implementation and evaluation (ADDIE) processes related to instructor-led classroom, web-conference, and web-based training
- Provided independent research, guidance and design in regards to cutting-edge training solutions: conceptualizing and overseeing an award winning, half million dollar development of a Virtual Bridge Inspection computer-based training
- Developed and led a 2-day, Virtual Foundation Expo that was conducted through a 3D, online virtual world, including live and on-demand streaming video content
- Conceptualized and planned a mobile app development to convert a 2,000-page reference manual into a usable, just-in-time training solution for bridge inspectors in the field
- Presented on “Growing Your Organization’s Virtual Training Presence” (60-75 minute workshop) at various training-related conferences, leveraging interactive text-message/Twitter/web-based polling software
- Evaluated participant comments for course improvements, as well as evaluates participant reactions to course instructors for quality control purposes

Macie Melendez

Instructional System Designer – Mid**Organization:** PTG-International**Highest Degree Completed:** B.A., English, San Diego State University**Years of Relevant Experience:** 11**Basis for Selection**

Macie Melendez is a writer and editor with more than a decade of experience in web-based training, online and print magazines, and publishing/media companies. She has strong organizational skills and thrives in deadline-driven environments. She is detail-oriented, responsible, and independent. Melendez currently serves as the editor and proofreader for several E-Content Consulting web-based training projects, where she ensures that all of the trainings are accurate, consistent, and that they provide the best information for the target audience.

Previous contributions have included the technical writing and editing of web-based content for the Highway Materials Engineering Course modules, Transportation Performance Management modules, and Use of 3D Engineered Models in Construction Training. She has also contributed her writing editing skills to the ITS JPO Case Study on Adaptive Signal Control Technologies, edited talking points and presentations for the Transportation Curriculum Coordination Council, and reviewed web-based content and informational brochures and fact sheets several FHWA offices.

Experience Relevant to Statement of Work

Editor, Risk Mitigation Through Title VI Reviews Course, National Highway Institute/Federal Highway Administration. Wrote and edited several civil rights case studies as part of an innovative, learner-centric blended course. The course contains 30 asynchronous micro-learning that participants can complete before attending a one-day in-person workshop. Reviewed and edited all micro-learning, which are in a variety of different formats including animated explainer videos, expert explainer videos, web demonstration videos, interactive infographics, downloadable PDF case studies, and highly-stylized web-based trainings that each have a different theme and concept design to hold learners interest and keep engagement high.

Editor, Federal Highway Administration (FHWA) Center for Local Aid Support Office of Innovative Program Delivery (OIPD). Created engaging content and edited storyboards for web-based training for the Local Technical Assistance Program (LTAP) and Tribal Technical Assistance Program (TTAP). Proofread all web-based courses to ensure they follow the client style guide. Works closely with instructional systems designers to ensure course is instructionally sound and meets all learning objectives. Implements subject matter expert feedback for web-based courses.

Writer/Editor, Federal Highway Administration (FHWA), Every Day Counts (EDC) Education Connection Video Series. In charge of writing and editing four different scripts (5–7 minutes in length) aimed at four specific target audiences with the goal of showing the emerging workforce all of the opportunities available to them in the highway transportation industry.

Editor, Sevatec, Air Education & Training Command (AETC). Worked as the editor for both the Front-End Analysis and Instructional Media Design Package reports. The overall purpose of this project was to update the SF Journeyman CDC from a text- and illustration-based format to more versatile approach, using interactive and engaging design techniques.

Editor, National Highway Institute (NHI), Portland Cement Concrete (PCC) Web-based Training Series. Worked as the main editor for this five-course series focused on different pavement preservation techniques that may be performed on PCC pavements, including full-depth repairs, partial-depth repairs, diamond grinding, dowel bar retrofit, and joint sealing.

Editor, American Association of State Highway and Transportation Officials (AASHTO) TC3. Works as the editor on various web-based courses and accompanying projects with a team of SMEs, ISDs, production, and a project manager. Created and edited more than 120 course descriptions to update the learning management system (LMS). Research and editing to aid in storyboard creation for several web-based trainings. Created and proofread 200 mobile job aids. Writes and edits promotional emails. Serves as the proofreader at all stages of development. Edits content for conversion from web-based training into responsive design for mobile learning.

Lead Editor, Iowa State University and National Concrete Pavement Technology Center, Guide for Concrete Pavement Distress Assessments and Solutions. Served as the lead editor and proofreader for the 19-chapter Guide for Concrete Pavement Distress Assessments and Solutions. Created a client-specific style guide, including chapter templates and overall Guide design styles. Worked with SMEs to ensure that all content was accurate and consistent.

Writer/Editor, American Association of State Highway and Transportation Officials (AASHTO), TC3 Learning Management System Support. Created and edited course descriptions for web-based training courses to update the LMS. Created Frequently Asked Questions document by aggregating client sources and updated all necessary information as related to this particular project.

Editor, Metropolitan Washington Airports Authority (MWAA). Edited and created a style guide for both the Conduct & Discipline and Travel Policy Training web-based courses.

Writer/Editor, Federal Highway Administration (FHWA) Highway Materials Engineering Course (HMEC). Served as the main editor throughout the project, from the Design Plan to the course evaluations and assessments. Served as the lead editor for all nine web-based training modules on highway materials. Edited and proofread Instructor Guides, Participant Workbooks, Lab Manuals, and Glossary associated with the course.

Writer/Editor, Iowa State, Virtual Workshops and Conferences/ON24. Provided support with reporting and overall editorial consistency throughout the Construction and Project Management Virtual Workshop, a five-day virtual workshop featuring 55 presentation webcasts. Created a condensed version of the Summary Report for clients to present at a higher level, editing the original document down from 160 pages to 45 pages.

Writer/Editor, Iowa State, Use of 3D Engineered Models in Construction Web-based Training.

Created a style guide to use throughout the editing process for the client. Reviewed and edited the training's Design Plan and Executive Brief. Served as the main editor on all four modules associated with the web-based training.

Education

Degree	Date Received	Institution
B.A., English	2006	San Diego State University

JAVIER MACHADO

**LABOR CATEGORY: INSTRUCTIONAL
PRODUCTION/TECHNICAL SPECIALIST**

Javier Machado is a web-based training (WBT) production developer with extensive experience in several rapid development and distance learning tools. For the past 12 years, he has worked for both the public and private sector and has been involved in several web-based training-related projects, design, and development initiatives. His ability to quickly learn software applications and tools has allowed him to work on several projects simultaneously. Machado is experienced in applying the right rapid development tools, enhancing graphics and illustrations, and versed with the incorporation of other media, such as video or animations, to each project assigned. He is also proficient in both the Windows and Mac application worlds.

Academic Background	• US Navy, Great Lakes IL, 2000–2006	Experience: Training Development and Delivery	12 years
	• UC Santa Barbara, 1992	Experience: Subject Matter Expertise or Instructional Systems Design	12 years
Professional Associations	• Training Officers Conference, International Association of Business Communicators, American Society for Training & Development		

EXPERIENCE

2018–Present PTG International

Production Specialist – Client: Federal Highway Administration (FHWA) National Highway Institute; Risk Mitigation Through Title VI Reviews Course

- Work closely with project manager and ISD to design and develop an innovative, learner-centric blended course.
- Creates animations, graphics, and visual aids to improve the usability/instructional soundness of the training
- Built and programmed interactions, knowledge checks, and other elements that are embedded into the web-based trainings using rapid development tools
- Worked with a team programming distance learning products that were engaging and 508 compliant
- Worked to create SCORM-compliant products that were tested in multiple browser products
- Made client updates and retested products for quality assurance and durability
- Used PowerPoint and Articulate as the rapid development training solution to develop the project, which also included revision cycles, publishing support, and quality testing

Production Specialist – Client: Federal Highway Administration (FHWA) Center for Local Aid Support Office of Innovative Program Delivery (OIPD)

- Work closely with project manager and ISD to design and develop an innovative, learner-centric blended course.
- Creates animations, graphics, and visual aids to improve the usability/instructional soundness of the training
- Built and programmed interactions, knowledge checks, and other elements that are embedded into the web-based trainings using rapid development tools
- Worked with a team programming distance learning products that were engaging and 508 compliant
- Worked to create SCORM-compliant products that were tested in multiple browser products
- Made client updates and retested products for quality assurance and durability

- Used PowerPoint and Articulate as the rapid development training solution to develop the project, which also included revision cycles, publishing support, and quality testing

2018–2019 E-Content Consulting supporting Sevatec

Production Specialist – Client: United States Air Force Security Forces Journeyman-Level E-Learning Course (J-eLC)

- Work closely with project manager and ISD to design an innovative, learner-centric blended course for the Security Forces (SF) Journeyman Career Development Course (CDC) from a text-and illustration-based format to more versatile approach, using highly interactive and engaging design techniques.
- Creates animations, graphics, and visual aids to improve the usability/instructional soundness of the training
- Built and programmed interactions, knowledge checks, and other elements that are embedded into the web-based trainings using rapid development tools
- Worked with a team programming distance learning products that were engaging and 508 compliant
- Worked to create SCORM-compliant products that were tested in multiple browser products
- Made client updates and retested products for quality assurance and durability
- Used PowerPoint and Articulate as the rapid development training solution to develop the project, which also included revision cycles, publishing support, and quality testing

2010–Present E-Content Consulting

Production Specialist – Client: AASHTO TC3 Learning Management System Support

- Converted outdated web-based training to new training templates
- Creates animations, graphics, and visual aids to improve the usability/instructional soundness of the training
- Worked with instructional system designer to build 2D and 3D simulated graphic animations to further enhance web-based training, tutorials, videos, and web-based lab simulation
- Built and programmed interactions, knowledge checks, and other Flash objects that are embedded into the web-based trainings using rapid development tools
- Worked with a team programming distance learning products that were engaging and 508 compliant
- Worked to create SCORM-compliant products that were tested in multiple browser products
- Made client updates and retested products for quality assurance and durability

Production Specialist – Client: Training Course Conversion, National Highway Institute (NHI), Federal Highway Administration (FHWA), Department of Transportation (DOT)

- E-Content Consulting was supporting NHI and TCCC in expanding its offerings for distance learning in order to reach a broader range of participants at lower cost
- Served as Web-based training production specialist in an effort to enhance NHI's and TCCC's course offerings through the conversion and development of asynchronous web-based delivery
- Set-up and tested the first FHWA mobile application
- Used PowerPoint and Presenter as the rapid development training solution to develop the project, which also included revision cycles, publishing support, and quality testing

Web-Based Training Developer – Client: Highmark Companies

- E-Content Consulting was working with Highmark Companies to develop standalone training modules that would support the internal employee training for the new timekeeping application
- Served as a web-based training production specialist in an effort to enhance NHI's and TCCC's course offerings through the conversion and development of asynchronous web-based delivery
- Used PowerPoint, Presenter, and Captivate as the rapid development training solution to develop projects, which also involved revision cycles, publishing support, and quality testing

Production Specialist – Client: Travel Training WBT Solutions, General Services Administration (GSA)

- E-Content Consulting was contracted to research and recommend a rapid development application solution for a distance learning program

2011–2018 Harpers Enterprise, Inc.

Production Support – Client: Federal Highway Administration (FHWA) Highway Materials Engineering Course (HMEC)

- Serving as an instructional technologist/production specialist for the re-development of the HMEC
- Built and programmed interactions, knowledge checks, and other Flash objects that are embedded into the web-based trainings using rapid development tools
- Lead the effort to seamlessly incorporate video clips and animations into web-based, web-conference, and instructor-led training

Production Support – Client: Noblis (Intelligent Transportation Systems Joint Program Office, ITS JPO) – Connected Vehicle 101 Workshop

- Built and programmed interactions, knowledge checks, and other Flash objects that are embedded into the web-based trainings using rapid development tools
- Worked with a team programming distance learning products that were engaging and 508 compliant
- Used troubleshooting capability to help the team successfully publish the training to multiple platforms and websites

Production Support – Client: Noblis (ITS JPO) – Connected Vehicle 101 Web-based Training

- Built and programmed interactions, knowledge checks, and other Flash objects that are embedded into the web-based trainings using rapid development tools
- Worked with a team programming distance learning products that were engaging and 508 compliant
- Used troubleshooting capability to help the team successfully publish the training to multiple platforms and websites

Production Support – Client: Iowa State (FHWA) – Use of 3D Engineered Models in Construction Web-based Training

- Built and programmed interactions, knowledge checks, and other Flash objects that are embedded into the web-based trainings using rapid development tools
- Worked with a team programming distance learning products that were engaging and 508 compliant
- Worked to create SCORM-compliant products that were tested in multiple browser products.
- Created animations, graphics, and visual aids to improve the usability/instructional soundness of the training
- Lead the effort to seamlessly incorporate video clips and animations into web-based training for enhanced user experience
- Made client updates and retested products for quality assurance and durability

Production Support – Client: NHI – TPM Target Setting Training Development

- Served as the instructional production specialist for the development of three web-based modules
- Took design templates provided by the graphic designer and made them more functional so that the training would run more smoothly
- Used a pragmatic approach to translate design goals into a workable solution to better convey concepts

Production Support – Client: NHI – ITS Procurement Training Development

- Built and programmed interactions, knowledge checks, and other Flash objects that are embedded into the web-based trainings using rapid development tools
- Worked with a team programming distance learning products that were engaging and 508 compliant
- Worked to create SCORM-compliant products that were tested in multiple browser products.
- Created animations, graphics, and visual aids to improve the usability/instructional soundness of the training
- Lead the effort to seamlessly incorporate video clips and animations into web-based training for enhanced user experience
- Made client updates and retested products for quality assurance and durability

KEVIN MONAGHAN

**LABOR CATEGORY: PROJECT MANAGER/
INSTRUCTIONAL TECHNOLOGIST**

Kevin Monaghan is a seasoned project manager for several key technology-driven trainings, information systems, learning management systems (LMS), virtual projects, mobile apps, and other distance learning projects. His client list includes FHWA and NHI within DOT along with several transportation-related associations, such as AASHTO and ISSA. Monaghan is well-versed in applying the principles of adult learning in large-scale training and curricula development projects as well as specific, focused course conversion projects (most commonly classroom-based to e-learning) for specialized audiences.

Academic Background	<ul style="list-style-type: none"> B.S. Liberal Arts, Arizona State University 	Training & Curricula Development and Delivery	15 years
		Experience: Project Management, Subject Matter Expertise, or Instructional Systems Design	30 years
		Security Clearance	FHWA Contractor Badge

EXPERIENCE

2018–Present E-Content Consulting supporting **PTG International**

Project Manager – Client: Federal Highway Administration (FHWA) National Highway Institute; Risk Mitigation Through Title VI Reviews Course

- Work closely with Subject Matter Experts (SMEs) to design and develop an innovative, learner-centric blended course.
- Work with ISD to develop 30 asynchronous micro-learning that participants can complete before attending a one-day in-person workshop. Micro-learning are in a variety of different formats including animated explainer videos, expert explainer videos, web demonstration videos, interactive infographics, downloadable PDF case studies, and highly-stylized web-based trainings
- Work with a team programming technical distance learning products that were engaging, 508 compliant, and SCORM-compliant products that will be tested in multiple browser products

Project Manager – Client: Federal Highway Administration (FHWA) Center for Local Aid Support Office of Innovative Program Delivery (OIPD)

- Work directly with the Program Manager and Contracting Officer for the OIPD, which consists of both the Local Technical Assistance Program (LTAP) and Tribal Technical Assistance Program (TTAP)
- Manage the development of curriculum outlines, design plan documents, content development, programming development, and pilot for new web-based trainings
- Manage this large-scale project while supporting relationships amongst the client, programmers, designers, subject matter experts (SMEs), instructional system designers (ISDs), technical review panels, and production team members
- Work with a team programming technical distance learning products that were engaging, 508 compliant, and SCORM-compliant products that will be tested in multiple browser products

2016–Present E-Content Consulting supporting **AASHTO**

Project Manager – Client: AASHTO support for TC3 Technical Service Program (2016–present)

- Work directly with the AASHTO Associate Program Director and TC3 Executive Board to implement technical service program goals
- Conduct multiple enhancement projects for online training store improvements, such as subscription pricing program implementation and improved user experience functionalities

- Provide ongoing support for online training registrants, external-facing LMS, state training sharing program, and monthly performance reporting
- Work with development team to build and implement mobile job aids that are available through the TC3 mobile app
- Manage the development of curriculum outlines, design plan documents, content development, programming development, and pilot for new web-based trainings
- Manage this large-scale project while supporting relationships amongst the client, programmers, designers, subject matter experts (SMEs), instructional system designers (ISDs), technical review panels, and production team members

2010–2019 E-Content Consulting supporting Harpers Enterprise, Inc.
Development Program Manager – Client: Federal Highway Administration (FHWA)
Highway Materials Engineering Course (HMEC)

- Served as the Project Manager for the re-development of the HMEC, which consists of 181 hours of training
- Led the overall update and delivery of the pilot session of the blended learning event
- Managed this large-scale project while building relationships amongst the many SMEs, ISDs, and production team members to allow a cohesive collaboration throughout the life of the project
- Redeveloped the former six weeks of instructor-led training in just 11 months
- Implemented a technology and environmental solution to deliver thousands of pages of course materials and distance learning courses through a tablet as opposed to hard copy
- Completed a pilot of the training that combined web-conference training, web-based training, independent study materials, and instructor-led training in March 2015 that was well received by the client and participants

Project Manager – Client: Iowa State, Concrete Pavement Preservation Series

- Served as the Project Manager for the development of five (5) web-based distance learning courses
- Led the creation of curriculum outline development, design plan documents, content development, programming development, and pilot for web-based training
- Managed this project while building relationships amongst the client, SMEs, ISDs, technical review panels, and production team members
- Worked with a team programming technical distance learning products that were engaging and 508 compliant
- Worked with a team to create SCORM-compliant products that were tested in multiple browser products
- Implemented client feedback, verified content updates, and retested products for quality assurance and stability
- Managed project budgets, built and submitted monthly status reports, and conducted all client correspondence and meetings
- Delivered project deliverables in compliance with project contracts and work plan schedules

Project Manager – Client: Iowa State, Virtual Workshops, Videos, and Virtual Events

- Served as the Project Manager for the development of videos, virtual conferences, and virtual events utilizing the ON24 platform
- Worked with team to write scripts, build storyboards, record talent, and design animated videos
- Built custom virtual environment to resemble headquarters
- Creation of 3D simulation objects to aid technical assistance and training, which were developed for a wide range of events and topic areas
- Worked with over 30 presenters to develop pre-recorded presentation that would be delivered in a simu-live and on-demand format

- Provided delivery support and technical assistance during virtual delivery event
- Built reports that were provided during delivery and post event

Project Manager – Client: AASHTO TC3 Learning Management System Support

- Serving as the Project Manager for the development and implementation of an external learning management system (LMS), updating over 150 instructional hours of the web-based distance learning courses, and the development of over 40 hours of new web-based distance learning courses
- Worked with programmers, designers, and others to implement a new website, e-bookstore, and external facing LMS in a short project time frame
- Led the creation of curriculum outline development, design plan documents, content development, programming development, and pilot for new web-based trainings
- Managed this large-scale project while building relationships amongst the client, programmers, designers, SMEs, ISDs, technical review panels, and production team members
- Worked with a team programming distance learning products that were engaging and 508 compliant
- Worked with a team to create SCORM-compliant products that were tested in multiple browser products
- Managed project budgets, built and submitted monthly status reports, and conducted all client correspondence and meetings; Delivered deliverables in compliance with contracts and work plan schedules

Project Manager – Client: Metropolitan Washington Airports Authority Web-based Trainings

- Served as the Project Manager for the development of the web-based distance learning course
- Led the creation of curriculum outline development, design plan documents, content development, programming development, and pilot for web-based training
- Managed this project while building relationships amongst the client, SMEs, ISDs, technical review panels, and production team members
- Worked with a team to create SCORM-compliant products that were tested in multiple browser products
- Implemented client feedback, verified content updates, and retested products for quality assurance and stability
- Managed project budgets, built and submitted monthly status reports, and conducted all client correspondence and meetings; Delivered deliverables in compliance with contracts and work plan schedules

Project Manager – Client: Defense Civilian Personnel Advisory Service (DCPAS) Performance Management Training

- Served as the Project Manager for the development of an instructor-led training.
- Led the production of content development for training materials
- Managed this project while building relationships amongst the client, SMEs, ISDs, technical review panels, and production team members.
- Implemented client feedback and verified content updates for quality assurance.
- Managed project budgets, built and submitted monthly status reports, and conducted all client correspondence and meetings; Delivered deliverables in compliance with contracts and work plan schedules

Project Manager – Client: Noblis, Connected Vehicles (CV101 Workshop, CV102 WBT, CV102 WBT, and CV201 Workshop)

- Served as the Project Manager for the development of a nationwide workshop

- Led the creation of curriculum outline development, design plan documents, content development, and pilot for workshop
- Managed this project while building relationships amongst the client, SMEs, ISDs, technical review panels, and production team members
- Implemented client feedback and verified content updates for quality assurance
- Worked with a team programming technical distance learning products that were engaging and 508 compliant
- Worked with a team to create SCORM-compliant products that were tested in multiple browser products
- Managed project budgets, built and submitted monthly status reports, and conducted all client correspondence and meetings; Delivered deliverables in compliance with contracts and work plan schedules

Eric Melendez
Developer/IT Specialist

Organization: E-Content Consulting

Highest Degree Completed: B.A., English, San Diego State University

Years of Relevant Experience: 12

Basis for Selection

Eric Melendez has 18 years of experience working in an educational environment, including at the community college and university levels at both private and public institutions. As Director of a Continuing Education Department for 10 years, he built, oversaw, and managed more than 50 online courses using several learning management systems, which were offered on a continuous basis. Melendez has extensive experience maintaining and overseeing online learning databases, including one with more than 20,000 course registrants. Melendez has nearly 20 years of experience in education—12 of which are in online education, including troubleshooting IT issues related to online learning.

Most recently, he's used this experience to program and update web-based trainings using rapid development programs. Melendez is a quick study and is skilled in several products and tools used for the development of distance learning including Articulate, PowerPoint, and Adobe Premier.

Experience Relevant to Statement of Work

Production Assistant, Multi-Objective Decision Analysis Web-Based Course, Spy Pond Partners. Built and programmed interactions, knowledge checks, and other Flash objects that are embedded into the web-based trainings using rapid development programs. Implemented new template and expanded upon new designs. Works closely with instructional system designer, making their vision a reality.

Production Assistant, Risk Mitigation Through Title VI Reviews Course, National Highway Institute/Federal Highway Administration. Built and programmed interactions, videos, and graphics for micro-learnings that participants can complete before attending a one-day in-person workshop. Micro-learnings are in a variety of different formats including animated explainer videos, expert explainer videos, web demonstration videos, interactive infographics, downloadable PDF case studies, and highly-stylized web-based trainings that each have a different theme and concept design to hold learners interest and keep engagement high.

Production Assistant, Federal Highway Administration (FHWA) Center for Local Aid Support Office of Innovative Program Delivery (OIPD). Built and programmed interactions, knowledge checks, and other Flash objects that are embedded into the web-based trainings using rapid development programs. Implemented new template and expanded upon new designs. Works under the direction of the senior production specialist and works closely with instructional system designer, making their vision a reality for the timely production of web-based training.

Production Assistant/Technical Support, American Association of State Highway and Transportation Officials (AASHTO) TC3. Built and programmed interactions, knowledge

checks, and other Flash objects that are embedded into the web-based trainings using rapid development programs. Program web-based courses for conversion into responsive designs to support mobile learning. Works under the direction of the senior production specialist, instructional system designer and subject matter experts, making their vision a reality for the timely production of web-based training. Building mobile job aids (MJAs) to support the TC3 mobile application. In addition, respond to user technical support questions regarding course completion, certificates, course accessibility, and general learning management system questions. Create and send course certifications of completion to participants as needed.

Director of Continuing Education, Alliant International University. Video recorded live courses to be made into online courses. Converted video lectures created as Adobe Flash to other video formats, including HTML5 and MP4 formats. Video edited course material into video lecture topics using the course PowerPoint slides and recorded video of the instructor's presentation. Responsible for overseeing and maintaining a database of more than 20,000 registrants. Responsible for overseeing student registration for in-class and online courses. Responsible for troubleshooting IT issues with online courses. Produced student certificates for in-class and online courses. Awarded contracts and worked with Los Angeles County Department of Mental Health to provide courses to 1,600 employees, which met the pre-licensure requirements for California psychologists, MFTs, LPCCs, and LCSWs.

Program Coordinator, San Diego State University College of Extended Studies. Issued letters of course completion, transcripts, and certificates for students. Developed the course schedule for 60+ courses each semester that included credit and non-credit certificate programs. Prepared and processed initial class set up in credit and noncredit systems, instructor contracts, registration materials, course packets, audiovisual requirements, custom text and instructor photocopy requirements payroll, and deposits. Using the department's databases, prepared and produced course enrollment analysis, task reports, schedules, marketing reports and forms as needed to support professional development classes, seminars, and conferences.

Education

Degree	Date Received	Institution
B.A., English	2005	San Diego State University

Relevant Employment History

Dates	Position(s)	Organization	Address
2019	Production and IT Support	PTG-International	1040 S. Cochran Los Angeles, CA 90019
2008 – 2018	Director of Continuing Education Department	Alliant International University	San Francisco and Irvine, CA
2005 – 2008	Program Coordinator	San Diego State University	San Diego, CA