

**NATIONAL ACADEMY OF SCIENCES
REQUEST FOR PROPOSAL NO. RFP-NAS-1135-07
SOLICITATION FOR: Institute of Medicine Website Redesign
ISSUANCE DATE: January 14, 2008
CLOSING DATE: January 31, 2008**

Dear Prospective Bidder,

The National Academy of Sciences (NAS) is seeking proposals from qualified firms interested in providing Website Redesign services as described in this solicitation.

All proposals submitted must be presented in accordance with the attached solicitation. Interested bidders should reply to Autumn Rose at arose@nas.edu for additional proposal submission instructions, and to receive access to a secure site. All proposals and technical questions must be submitted through the secure site. Adobe PDF files are the preferred electronic format for the submittal of your proposals.

Issuance of this solicitation does not constitute an award commitment by NAS nor does it obligate the NAS to pay for costs incurred in the preparation and submission of proposal. Any award resulting from this solicitation shall be construed under the laws of the District of Columbia.

Any sample proprietary artwork required with submission of offer shall be returned at sender's request. Proposals must be received by close of business on the closing date indicated on the cover page of this solicitation. Proposals must remain available for acceptance by NAS for a minimum of sixty (90) days. Bidders will be expected to present oral presentations in addition to written proposals as shown in RFP schedule.

Any general questions concerning this solicitation should be directed to Darry Green at office phone (202) 334-2663 or by email to dlgreen@nas.edu.

Sincerely yours,

//Signed//

Darry Green, C.P.M.
Manager, Procurement Services

Enclosures: As stated in Section I below

SECTION I

INSTRUCTIONS AND CONDITIONS

DEFINITIONS

Discussions are negotiations that occur after establishment of the competitive range that may, at the NAS Procurement Officer's discretion, result in the offeror being allowed to revise its proposal.

In Writing or **written** means any worded or numbered expression which can be read, reproduced, and later communicated, and includes electronically transmitted and stored information.

Proposal modification is a change to a proposal made after the solicitation closing date, at the request of or allowed by the NAS Procurement Officer as the result of negotiations.

Time, if stated as a number of days, is calculated using calendar days, unless otherwise specified, and will include Saturdays, Sundays, and legal holidays. However, if the last day falls on a Saturday, Sunday, or legal holiday, then the period shall include the next working day.

CONTENTS TO SOLICITATION

The solicitation consists of this cover letter and the following documents:

<u>Sections</u>	<u>Title</u>
I	Instructions and Conditions
II	Statement of Work
III	Representation and Certifications

AMENDMENTS TO SOLICITATIONS

If this solicitation is amended, all terms and conditions that are not amended remain unchanged. Offerors shall acknowledge receipt of any amendment to this solicitation by the date and time specified in the amendment(s).

UNNECESSARILY ELABORATE PROPOSALS OR QUOTATIONS

Unnecessarily elaborate brochures or other presentations beyond those sufficient to present a complete and effective response to this solicitation are not desired and may be construed as an indication of the offeror's lack of cost consciousness. Elaborate art work, expensive paper and bindings, and expensive visual and other presentation aids are neither necessary nor desired.

SUBMISSION, MODIFICATION, REVISION AND WITHDRAWAL OF PROPOSALS

- (1) Proposals and modifications to proposals shall be submitted in electronic media or as an optional method by request in writing in sealed envelopes or packages (i) addressed to the office specified in the solicitation, and (ii) showing the time and date specified for receipt, the solicitation number, and the name and address of the Offeror. Offerors using commercial carriers should ensure that the proposal is marked on the outermost wrapper with the information under (1)(i) and (1)(ii) of this provision.
- (2) The first page of the proposal must show—
 - The solicitation number;
 - The name, address, and telephone and facsimile numbers of the Offeror (and electronic address if available);
 - A statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation and agreement to furnish any or all items upon which prices are offered at the price set opposite each item;
 - Name, titles, and telephone and facsimile numbers (and electronic address if available) of persons authorized to sign the proposal. Proposals signed by an agent shall be accompanied by evidence of that agent's authority, unless that evidence has been previously furnished to the issuing office.

Proposals submitted in response to this solicitation shall be in English and in U.S. dollars, unless otherwise permitted by the solicitation.

Unless otherwise specified in the solicitation, the Offeror must propose to provide all items.

Proposals may be withdrawn by written notice or telegram received at any time before award. An Offeror or an authorized representative may withdraw proposals in person, if the representative's identity is made known and the representative signs a receipt for the proposal before award. Withdrawals are effective upon receipt of notice by the NAS Contracting Officer.

Acceptable evidence to establish the time of receipt at NAS includes the time/date stamp of the Office of Contracts and Grants on the proposal wrapper, other documentary evidence of receipt maintained by NAS, or oral testimony or statements of NAS personnel.

If an emergency or unanticipated event interrupts normal NAS processes so that proposals cannot be received at the office designated for receipt of proposals by the exact time specified in the solicitation, and urgent NAS requirements preclude amendment of the solicitation or other notice of an extension of the closing date, the time specified for receipt of proposals will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal NAS business resumes.

LATE PROPOSALS AND REVISIONS

Any proposal received at the office designated in the solicitation after the exact time specified for receipt of offers will not be considered unless it is received before award is made and—

- If it was sent by preferred email, in electronic format and electronically time stamped on the business day of closing date, yet file is proven accidentally deleted or misfiled by NAS .
- If submitted by mail option, it was sent by U.S. Postal Service Express Mail Next Day Service-Post Office to addressee, not later than 5:00 P.M. at the place of mailing two working days prior to the date specified for receipt of proposals. The term “working days” excludes weekends and U.S. Federal holidays.
- There is acceptable evidence to establish that it was received at the activity designated for receipt of offers and was under NAS’s control prior to the time set for receipt of offers, and the NAS Contracting Officer determines that accepting the late offer would not unduly delay the procurement; or
- It is the only proposal received.

The only acceptable evidence to establish the date of mailing of a late offer, modification or revision, or withdrawal sent by Express Mail Next Day Service-Post Office to addressee is the date entered by the Post Office receiving clerk on the label and the postmark on both the envelope or wrapper and on the original receipt from the U.S. Postal Service.

A late modification or a revision of an otherwise successful proposal that makes its terms more favorable to NAS will be considered at any time it is received and may be accepted.

Offerors may submit modifications to their proposals at any time before the solicitation closing date and time, and may submit modifications in response to an amendment, or to correct a mistake, at any time before award.

Offerors may submit revised proposals only if requested or allowed by the NAS Contracting Officer.

RESTRICTION ON DISCLOSURE AND USE OF DATA

Offerors that include in their proposals data that they do not want disclosed to the public for any purpose or used by NAS except for evaluation purposes, shall:

- Mark the title page with the following legend: “This proposal includes data that shall not be disclosed outside NAS and shall not be duplicated, used or disclosed — in whole or in part — for any purpose other than to evaluate this proposal. If however, if a contract is awarded to this Offeror as a result of, or in connection with, the submission of this data, NAS 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 NAS right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets *[insert numbers or other identification of sheets]*.”
- Mark each sheet of data it wishes to restrict with the following legend: “Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal.”

NAS will not disclose data so marked to the extent consistent with NAS’s public access policies.

CONTRACT AWARD

NAS intends to award a contract or contracts resulting from this solicitation to the responsible Offeror(s) whose proposal(s) represent the Best Value after evaluation in accordance with the factors and subfactors in the solicitation.

NAS reserves the right to make multiple awards if, after considering the additional administrative costs, it is in its best interest to do so.

NAS may reject any or all proposals if such action is in its interest.

NAS may waive informalities and minor irregularities in proposals received.

NAS intends to evaluate proposals and award a contract without discussions with Offerors (except clarifications, e.g., the relevance of an Offeror's past performance information and adverse past performance information to which the Offeror has not previously had an opportunity to respond, or to resolve minor or clerical errors). Therefore, the Offeror's initial proposal should contain the Offeror's best terms from a cost or price and technical standpoint.

NAS reserves the right to conduct discussions if the NAS Contracting Officer later determines them to be necessary. If the NAS Contracting Officer determines that the number of proposals that would otherwise be in the competitive range exceeds the number at which an efficient competition can be conducted, the NAS Contracting Officer may limit the number of proposals in the competitive range to the greatest number that will permit an efficient competition among the most highly rated proposals.

However, if it is in NAS's best interest, NAS may evaluate proposals and award a contract after conducting discussions with Offerors whose proposals have been determined to be in the competitive range.

NAS reserves the right to make an award on any item for a quantity less than the quantity offered, at the unit cost or prices offered, unless the offeror specifies otherwise in the proposal.

Exchanges with Offerors after receipt of a proposal do not constitute a rejection or counteroffer by NAS.

NAS may determine that a proposal is unacceptable if the prices proposed are materially unbalanced between line items or subline items. Unbalanced pricing exists when, despite an acceptable total evaluated price, the price of one or more contract line items is significantly overstated or understated as indicated by the application of cost or price analysis techniques. A proposal may be rejected if the NAS Contracting Officer determines that the lack of balance poses an unacceptable risk to NAS.

If a cost realism analysis is performed, then the source selection authority in evaluating performance or schedule risk may consider cost realism.

SELECTION CRITERIA

Information relevant to these criteria may be presented within the normal format of the proposal in response to this RFP. The criteria will be uniformly applied in the evaluation of the proposals, with relative order of importance indicated by approximate weighting.

30%	Compliance with Specifications
20%	Price
25%	Project Planning
10%	Past Experience and References
15%	Oral Presentations

DETERMINATION OF COMPETITIVE RANGE AND CONTRACTOR SELECTION

The competitive range shall be established by the Office of Contracts and Grants, based on the above evaluation factors, and will be comprised of the most highly rated proposals, or the greatest number of proposals that will permit an efficient competition among those most highly rated. The award will be made from the Office of Contracts and Grants to the responsible Offeror whose proposal, conforming to the solicitation, is most advantageous to the NAS considering the above factors.

RECEIPT OF PROPOSALS

Proposals must be received by end of calendar day on the closing date indicated on the cover page of this solicitation. Proposals must remain available for acceptance by NAS for a minimum of sixty (60) days.

PREPARATION OF TECHNICAL AND COST PROPOSALS

Proposals shall be submitted with a separate technical and cost portion.

Cover Letter

Proposal must have a cover letter signed by an authorized representative. Cover letter must contain a statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation and agreement to furnish any or all items upon which prices are offered at the price set opposite each item.

- **Technical Portion.**
The technical portion of the proposal should be specific, complete, and presented concisely. It should provide a general description of your organization and its ability to perform the specified requirements. It must set forth in detail the conceptual approach, methodology, procedures and techniques for the accomplishment of the stated objectives. The proposal must define the technical resources, capabilities, and expertise both of the submitting organization and of the professional personnel proposed, including the identification of the individual designated to serve as the project manager/principal representative.

The information presenting the capabilities of the organization and of the individuals to be assigned should spell out clearly the pertinent work experience and accomplishments in developing and conducting a program of the type required under the contract through the submission of verifiable, objective supporting evidence of successful program implementation. The proposal should include a list of supplies and equipment anticipated under the contract. If this matter is not addressed, it will be assumed that there is no need to purchase equipment or incur special expenditures for this purpose.

- **Cost Portion.**

The cost portion of the proposal must provide in detail the total proposed costs for implementation of the program described in this solicitation. It shall include whatever schedules are necessary to adequately support and/or explain the proposed pricing. Hourly consultant rates should be provided for support if required during the implementation phase II.

RFP SCHEDULE

The following table represents the full RFP schedule from date of issue through evaluation and award. These dates may be extended or changed by NAS after issued date if deemed appropriate. If dates are changed, an RFP amendment will be issued reflecting the revised dates. NAS will issue a written response to all bidders addressing collective questions at least three days prior to RFP due date. Oral Presentations will be scheduled between dates shown below individual and only with bidders deemed to be within the top competitive range by NAS.

Issue Date	January 14, 2008
Bid / No Bid Notification *	January 18, 2008
Questions Due	January 22, 2008
RFP Due Date	January 31, 2008
Oral Presentations (NAS Optional)	February 8, 2008– February 22, 2008

*Vendor should notify NAS in writing if they do not plan to bid.

PROPOSAL EVALUATION

The Academy reserves the right to make an award on any item for a quantity less than the quantity offered, at the unit cost or prices offered, unless the offeror specifies otherwise in the proposal.

The Academy reserves the right to make multiple awards if, after considering the additional administrative costs, it is in the Academy's best interest to do so.

Exchanges with Offerors after receipt of a proposal do not constitute a rejection or counteroffer by the Academy.

The Academy may determine that a proposal is unacceptable if the prices proposed are materially unbalanced between line items or subline items. Unbalanced pricing exists when, despite an acceptable total evaluated price, the price of one or more contract line items is significantly overstated or understated as indicated by the application of cost or price analysis techniques. A proposal may be rejected if the NA Contracting Officer determines that the lack of balance poses an unacceptable risk to the Academy.

If a cost realism analysis is performed cost realism may be considered by the source selection authority in evaluating performance or schedule risk.

A written award or acceptance of proposal mailed or otherwise furnished to the successful Offeror within the time specified in the proposal shall result in a binding contract without further action by either party.

The Academy may disclose the following information in postaward debriefings to other Offerors:

- The overall evaluated rating of cost or price and technical rating of the successful Offeror;
- The overall ranking of all Offerors, when any ranking was developed by the Academy during source selection;
- A summary of the rationale for award; and
- For acquisitions of commercial items, the make and model of the item to be delivered by the successful Offeror.

TYPE OF AWARD

The Academy anticipates a Fixed Price type contract resulting from this solicitation. Fixed incremental payments will be made based on proposed progress payments scheduled by deliverable milestones.

PERIOD OF PERFORMANCE

The anticipated period of performance under the contract awarded as a result of this solicitation is three (3) months, March 1, 2008 through June 30, 2008. Milestones must be shown in order to meet the ending date of each track within the statement of work.

REQUIREMENT FOR PAST PERFORMANCE REFERENCES

The Offeror is required to submit, as part of its proposal, at least three (3) industry references and a list of journal customers in respect to previous contracts involving the provision of similar or related services within the past three years.

The information supplied must include –

- (1) name and address of the organization for which the work was performed;
- (2) current telephone number of a responsible technical representative of that organization;
- (3) number, if any of each contract; and,
- (4) brief description of the services provided, including the period of performance.

A proposed staffing roster with brief statements about their training and background may also be provided.

GENERAL INSURANCE AND INDEMNIFICATION

The following requirements shall be included in the contract awarded as a result of this solicitation.

The Contractor shall not commence work until the Contractor has obtained at the Contractor's own expense all of the insurance as required hereunder and such insurance has been approved by the NA. Approval of insurance required of the Contractor will be granted only after submission to the NA of original certificates of insurance signed by authorized representatives of the insurers or, at the NA's request, certified copies of the required insurance policies.

Insurance as required hereunder shall be in force throughout the term of the contract award. Original certificates signed by authorized representatives of the insurers or, at the NA's request, certified copies of insurance policies, evidencing that the required insurance is in effect, shall be maintained with the NA throughout the term of the contract.

- A. Insurance: The Contractor will maintain insurance during the performance of this contract at its own expense with coverage and limits not less than specified in the Federal Acquisition Regulations, or required by law., whichever which is greater:
 - 1. Commercial general liability insurance, or its equivalent, for bodily injury (including death), personal injury, and property damage (including loss of use).
 - 2. Workers compensation insurance, or its equivalent, with statutory benefits as required by District of Columbia, Maryland and Federal law, including standard "other states" coverage; employers liability insurance, or its equivalent;
 - 3. Business automobile liability insurance, or its equivalent, if vehicles will be used in the performance of the contract.
- B. Limits of Liability: It is expressly understood that insurance protection required by this clause in no way limits the Contractor's obligations under the clause. "Contractor Liability", nor will it be construed to relieve Contractor of Liability in excess of insurance policy coverage.
- C. Waiver: Contractor waives all rights of recovery against the NA for any claims, damages, costs or expenses covered by any insurance policies carried by the Contractor and for any damage or loss of use of personal property owned or leased by the Contractor.

All required insurance coverage's must be underwritten by insurers allowed to do business in the District of Columbia, Maryland and California and acceptable to the NA.

The insurers must also have a Best's Rating of "A-" or better, and a financial size of "Class VII" or better in the latest evaluation by A. M. Best Company, unless NA grants specific approval for an exception.

Any deductible or retention amounts elected by the Contractor or imposed by the Contractor's insurer(s) shall be the sole responsibility of the Contractor.

The Contractor waives all rights of recovery against The National Academies, National Academy of Sciences (NAS), The National Academy of Engineering (NAE), The Institute of Medicine (IOM), The National Research Council (NRC), The National Academy of Engineering Fund and Their directors, Trustees, officers, agents and employees for any claims, damages, costs or expenses covered by any insurance policies carried by the Contractor and for any damage or loss of use of personal property owned or leased by the Contractor.

<u>NAS Point-of-Contact Technical</u>	<u>NAS Point-of-Contact Financial and Contractual</u>
Autumn Rose Manager of Web Communications 500 Fifth St., NW Washington, DC 20001 Tel: (202) 334-2465 Fax: (202) 334-1412 aaRose@nas.edu	Darry Green Manager, Procurement Services 500 Fifth St., NW Washington, DC 20001 Tel: (202) 334-2663 Fax: (202) 334-1835 dlgreen@nas.edu

SECTION II

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About the IOM

The IOM and the National Academies use a unique process to obtain authoritative, objective, and scientifically balanced answers to difficult questions of national importance. Our work is conducted by committees of volunteer scientists—leading national and international experts—who serve without compensation.

Committees are carefully composed to ensure the requisite expertise and to avoid bias or conflict of interest. Every report produced by our committees undergoes an extensive review and evaluation process by a group of external experts who are anonymous to the committee and whose names are revealed only once the study is published. Since 1970 the results of these committee deliberations have been relied on to provide policy makers with evidence-based recommendations.

The IOM's work centers principally on committee studies and reports on subjects ranging from quality of medical care to the national smallpox vaccination program; from centers of excellence at the National Institutes of Health (NIH) to protecting the nation's food supply. We also convene roundtables, workshops, and symposia that provide an opportunity for public- and private-sector experts to discuss contentious issues in an open environment that facilitates dialogue.

The IOM's members are distinguished individuals from the fields of health care; natural, social, and behavioral sciences; law; administration; government service; and engineering. Each year, the membership body, which is currently comprised of over 1,600 people, elects 65 new members and 5 foreign associates based on professional excellence, achievements, and willingness to serve the IOM's mission.

IOM Mission Statement

The IOM serves as adviser to the nation to improve health. Established in 1970 under the charter of the National Academy of Sciences, the IOM provides independent, objective, evidence-based advice to policy makers, health professionals, the private sector, and the public.

Branding Requirements

As a division within the National Academies, the IOM must follow certain visual identity guidelines. These guidelines are outlined in ***Attachment I***.

Goal for Redesign

The redesign's focus is on clean design through the incorporation of intuitive navigation and organization in a way that communicates the full breadth of the IOM's work to targeted audiences. Due to the complexities of the IOM's structure and the sheer volume of content it produces, many visitors to the current site become confused and frustrated when looking for specific content. Our goal is to organize all content in a unified way that is intuitive for our target audience members whether they are newcomers or they are

familiar with the IOM and its structure. The new site should use information architecture and visual design to bring together four pieces, which are fragmented in the current site:

1. **Current IOM content**, which includes the homepage, “about us” pages, board pages, project pages, event pages, and all supplemental pages connected with each
2. **Derivative and Supplemental products**, which can vary widely based on project, but can take the form of a report brief or tip sheet (PDF), a podcast (MP3), or a specialty website (HTML)
3. **IOM Membership site**, which contains information on the IOM’s membership (available to the public) and resources for current IOM members (protected)
4. **Committee Portals**, which contain project-specific interactive pages built out using BEA Portal technology; we would like a way to consistently link to these though the project pages so committee members just need to turn to one place for all the project information

Each of these pieces should be integrated in the new site, and we should have the ability to showcase any of them as appropriate. We would also like to explore the possibility of creating “living reports” by integrating discussion boards and online communities into the site for both members and non-members. This feature will not be completely addressed in this round, but we would like to design a site where these future upgrades are taken into account while choosing technologies and designing the site architecture.

Key Audiences

The purpose of the IOM’s website is to reach out and engage target audiences in order to disseminate information. Each audience has a unique set of needs that must be addressed in the re-design in order to create an effective site. **Attachment II** summarizes the IOM’s key audiences and our best understanding of how the IOM can serve them. We hope to address their needs—where possible and applicable.

Scope of Work

This statement of work encompasses the first of a two-phase process for the re-design of the Institute of Medicine (IOM) website. The first phase will primarily consist of the development of the design and requirements. The site build-out and migration will be included in the second phase and is not covered in this statement of work. Bidding on the first phase does not exclude vendors from bidding on the second phase.

The scope of work for this phase of the process requires that the contractor provides the following services:

- o Evaluate and refine the website strategy
- o Evaluate the content with recommendations for re-purposing current content and recommendations for new content
- o Identify opportunities to integrate dynamically generated content and links throughout the site (NOTE: Our current site has dynamically generated links and lists of links on most pages and this has been quite successful in “cross advertizing” content and preventing orphan pages. We would like to continue this in the redesign. Please see **Attachment V** for details.)

- o Identify opportunities to integrate in new and 3rd party site features outlined on page 4.
- o Develop information architecture (AI), including site map, recommendations for content types/or groups of content (existing or new), and wire frames for specific content types
- o Conduct user testing on wire-frame diagrams to identify problems in information architecture, users will be coordinated by IOM staff
- o Develop recommendations for technical requirements and infrastructure to be used for second phase of re-design
- o Review /recommend possible CMS applications to support new design
- o Make minor alterations to wire frames to ensure optimal compatibility once CMS is selected by the IOM
- o Graphic design

Integration Needs

The IOM would like to better integrate/expand to include the following functionality into the overall architecture and interface of the site:

New/Expanded Site Features

Online Meeting Registration

This is achieved through a custom application, survey software integrated into site or CMS.

Report Purchasing

Through integration with the National Academies Press website (www.nap.edu), the IOM would like to offer a “satellite book store” using feeds from the NAP online book store.

RSS Feeds

Create topic specific RSS feeds that can be subscribed to from pages on the IOM site that fall under topic areas.

E-Newsletters

Integrate new ExactTarget email marketing system into site to provide multiple opportunities for visitors to sign up for subject or project specific e-newsletters. Also identify ways for website content to be dynamically added to e-newsletters via content management system integration.

Visual Integration

Google Search Appliance

Create a customized look for search results page

Committee Collaboration Portals

These will be built out by internal ITS staff using BEA portal system. We would like to extend the look and feel developed for the IOM site to create the interface of these portals. Links to committee portals should be consistently placed within project pages on the public IOM site.

Membership Interest Group Portals

These should be customized using the same concept as the committee collaboration portals. Links to the membership interest groups should be made available in the membership portion of the site.

Membership & Committee Member Database

The membership database is enterprise-level membership management software that will be purchased in the coming months. We would like to identify places to integrate with the new system in order to take advantage of membership dues payment and the ability to update membership information online. We are also looking into the possibility of customizing the application with the look and feel of the new IOM site.

Selection Criteria

Information relevant to these criteria should be presented within the normal proposal format in response to this RFP. The criteria will be uniformly applied in the evaluation of the proposals with relative order of importance as indicated by approximate weighting below. Proposals for the design and development of functional and technical requirements for the official website for the IOM should contain the following elements:

- A detailed description of the process that will be followed to complete the elements should be laid out in the statement of work.
- A timeline with milestones consistent with the projected schedule, or an alternative schedule with reasons for modification.
- A detailed and comprehensive cost estimate for the project. The budget summary should be presented in terms of deliverables and include the following costs:
 - o Strategy evaluation
 - o Content evaluation
 - o Information architecture
 - Site map
 - Content types/or groups of content (existing or new)
 - Wire frames for specific content types
 - o User testing on wire frame diagrams
 - o Development of technical and functional requirements
 - o Graphic design
 - o Recommendation/review of possible CMS applications
 - o Minor alterations to wire frames once CMS selection is finalized
 - o Hourly-rate pricing for optional consulting hours for phase two of the website build out.
 - o Any additional costs not listed here (such as travel)
- Information on previous projects carried out by the vendor, which have been similar to this one in nature and scope.
- The names, qualifications, and duties of the vendor's employees who will substantively contribute to this project.
- A list of any sub-contractors that will be used by the vendor, if applicable. This should be accompanied by a description of each sub-contractor's prior work.

Attachment I: Branding Requirements

The IOM Logotype:



The IOM must be linked to the National Academies on all communications materials: below the words "Institute of Medicine" must be the words (in italics and all caps) "OF THE NATIONAL ACADEMIES."

In the IOM logotype, the colors used must be black and/or PMS 349 Green.

The font originally used in the IOM logotype was Macintosh Futura (an old font that is not available anymore for Mac or PC).

The serpent has been a symbol of long life, healing, and knowledge among almost all cultures and religions since the beginning of recorded history. The serpent adopted as a logotype by the Institute of Medicine is a relief carving from ancient Greece, now held by the Staatliche Museen in Berlin.

The National Academies Identifier:

THE NATIONAL ACADEMIES
Advisers to the Nation on Science, Engineering, and Medicine

The National Academies identifier (above) must be used on all of the IOM's official communications, whether print or electronic. The graphic instance of the identifier consists of the words "The National Academies," always with a rule under the name, and includes the tag line "Advisers to the Nation on Science, Engineering, and Medicine." When used as plain text, the tag line "Advisers to the Nation . . ." is optional.

Attachment II: Key Audiences

CONGRESSIONAL STAFF AND CAUCUS MEMBERS/ OTHER POLICY MAKERS

We want them to . . .	They want from us . . .	Meeting the needs through . . .
- o Be aware of the topics the IOM focuses on - o Take IOM report recommendations into account when enacting legislation - o Draw on IOM's guidance in current and future issues	- o Easy-to-digest summaries - o Easy-to-use site—make important content obvious - o Printable summaries easy to read online	- o Clear pathways to key content - o Syndication of content tailored by topic area - o HTML report briefs that are downloadable in PDF format

RESEARCHERS

We want them to . . .	They want from us . . .	Meeting the needs through . . .
- o Use IOM reports - o Plug IOM data into other work	- o Detailed information as found in peer-reviewed journals - o Access to deep practical content as desired - o Syntheses and indexes - o National level collaboration on issues	- o Content with multiple levels of complexity, including report brief, short summary, and full report - o Searchable bibliographies - o List of who is on the committee - o Quick reference to recommendations - o Live online panel discussion on current topics

HEALTH PRACTITIONERS

We want them to . . .	They want from us . . .	Meeting the needs through . . .
- o Put IOM reports/ recommendations into practice - o Become health advocates	- o Fact sheets and issue briefs for quick turnaround - o Access to deep practical content as desired - o Synthesis and indexes - o Aggregated scholarly studies	- o Content for multiple levels of literacy, e.g., handouts for patients - o Tailored data and narrative content - o Webcasts of events/presentations

MEDIA

We want them to . . .	They want from us . . .	Meeting the needs through . . .
- o Report on the report, the findings, and the success stories - o Weave IOM data and/or information into objective and powerful stories/broadcasts, cite our site and research	- o Interesting stories, article ideas, and resources such as quotes, contacts, graphics, reliable and verifiable data. - o Data and information in ready-to-use chunks—quick fact sheets, abstracts, summaries, quotes, and human interest articles - o Ready-to-access content in advance of release - o Explanations of key policy messages - o Photos and graphs - o Access to experts - o No marketing, no fluff - o Short URL to reference within articles	- o Access to content on multiple levels - o Live online panel discussions - o Directory of experts - o Media briefings - o Posting presentation materials to project sites after workshops. - o Short, easy-to-remember re-directs for each project

MEMBERS

We want them to . . .	They want from us . . .	Meeting the needs through . . .
- o Feel part of a community - o Nominate new members online - o Participate in membership events	- o Advance notice of forthcoming studies (opportunity to volunteer or suggest committee members) - o Notification of new reports - o Reports in accessible form - o News about other members	- o Searchable member directories - o Personal profile w/ability to update - o Election information and access to Online Nomination System - o Interactive Communities: membership section, Interest Groups, Membership Committee, Council - o Regional meetings, other member events - o Membership-specific e-newsletter

DONORS/SPONSORS

We want them to . . .	They want from us . . .	Meeting the needs through . . .
- o Donate - o Learn about our work	- o Basic information about us - o Clear donation tools - o Access to development office/staff - o Information on our report's impact	- o A clearly written "About Us" section accessible from the homepage - o Online donation form/instructions - o Easy-to-find contact info for development staff

IOM Staff

We want them to . . .	They want from us . . .	Meeting the needs through . . .
o Promote the IOM	- o Materials they can use to promote IOM externally - o Timely information about what's going on at IOM - o Easily search through past reports by subject area - o Online meeting registration and management	- o Short, easy to remember URLs to promote at meetings and announcements - o Increased search-ability on current projects and reports. - o Promotion of upcoming events on the homepage and in event index. - o Online registration application.

Attachment III: Current Site Size and Traffic Summary

Size of Current Site

The current website is run by a **2.42 GB SQL** database and includes the resources listed below. This list is not exhaustive and does not include all PDF files, audio files, and general sub-pages (which are added to project, event, and board pages to hold supplemental information). NOTE: Google Analytics estimates the IOM's site to have approx 2,500 pages, but this number does not include files (PDF or audio) that are included in the site.

Page Types	Quantity on Curent Site
Board Pages	14
Current Project Pages	75+
Report Pages	500
Report Briefs	130
Event Pages	465+

Traffic on Current Site

Page views per day.....15,000 to 20,000
Unique visitors per day.....4,000 to 5,000
Location of visitors.....80% domestic, 20% international
Average page visits per visitor..... 3 pages

Attachment IV: Current Site Content Summary

The IOM website (www.iom.edu) is a content-driven site with the objective of disseminating IOM project and report information and recommendations. This is currently accomplished through the three page types outlined below. Within the re-design we wish to examine these content types and make adjustments as necessary. We would like to identify methods to seamlessly integrate all links and resources into the overall architecture and design of the site.

- 1) Project pages contain background information, meeting agendas, audio recordings of past meetings, listserv registration, and meeting registration. These pages are managed by project staff. Project pages often contain additional subpages which provide supplemental information related to the project. These pages also offer links to:
 - Link to the National Academies' Current Project System (legal requirement)
 - Link to online listserv registration coordinated through the National Academies' Information Technology Service (ITS) and LSoft (a listserv management tool)
 - Link to online meetings registration is coordinated through pages created by ITS
- 2) Report pages contain a short report summary, image of the report cover, PDF "report briefs," a link to any press releases, a link to order the full report online, and a link to the report's summary chapter.
 - The IOM provides the short report summaries and PDF report briefs.
 - The National Academies Press (NAP) provides link to online book purchasing, the report summary, and cover image.
 - The Office of News and Public Information (ONPI) provides press releases.
- 3) Board pages vary by board, but generally provide a list of past reports, current projects, and staff members.

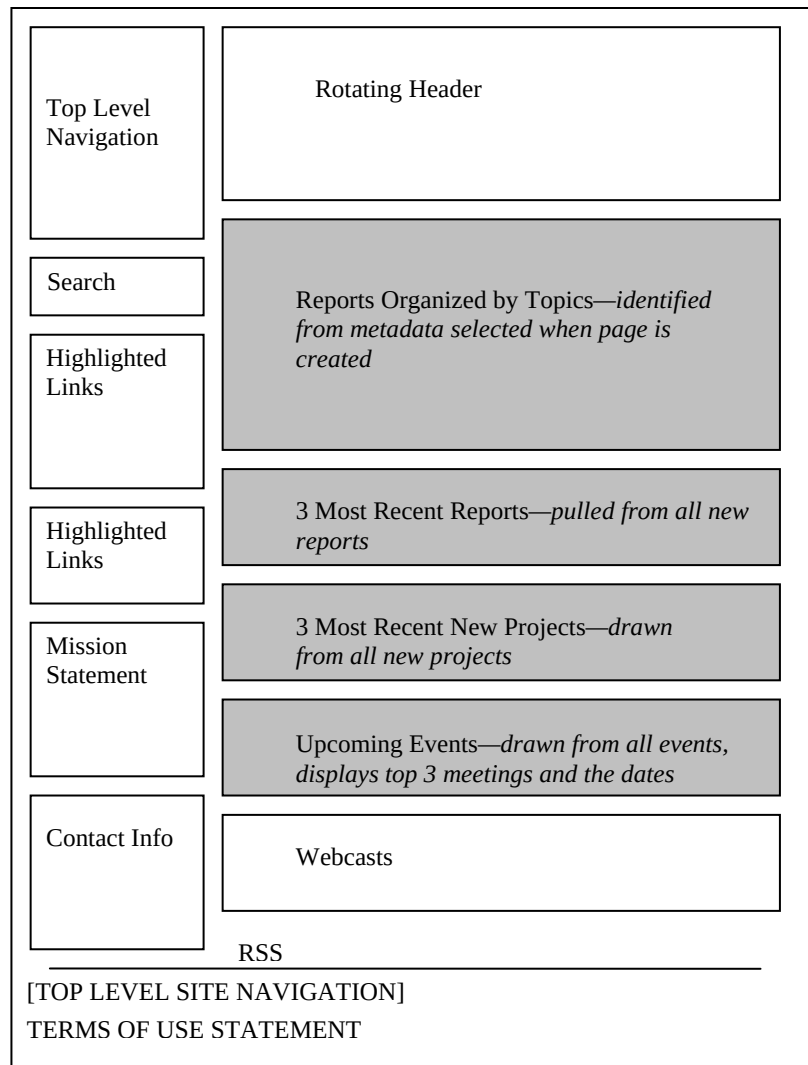
Attachment V: Current Site Dynamic Content

Key

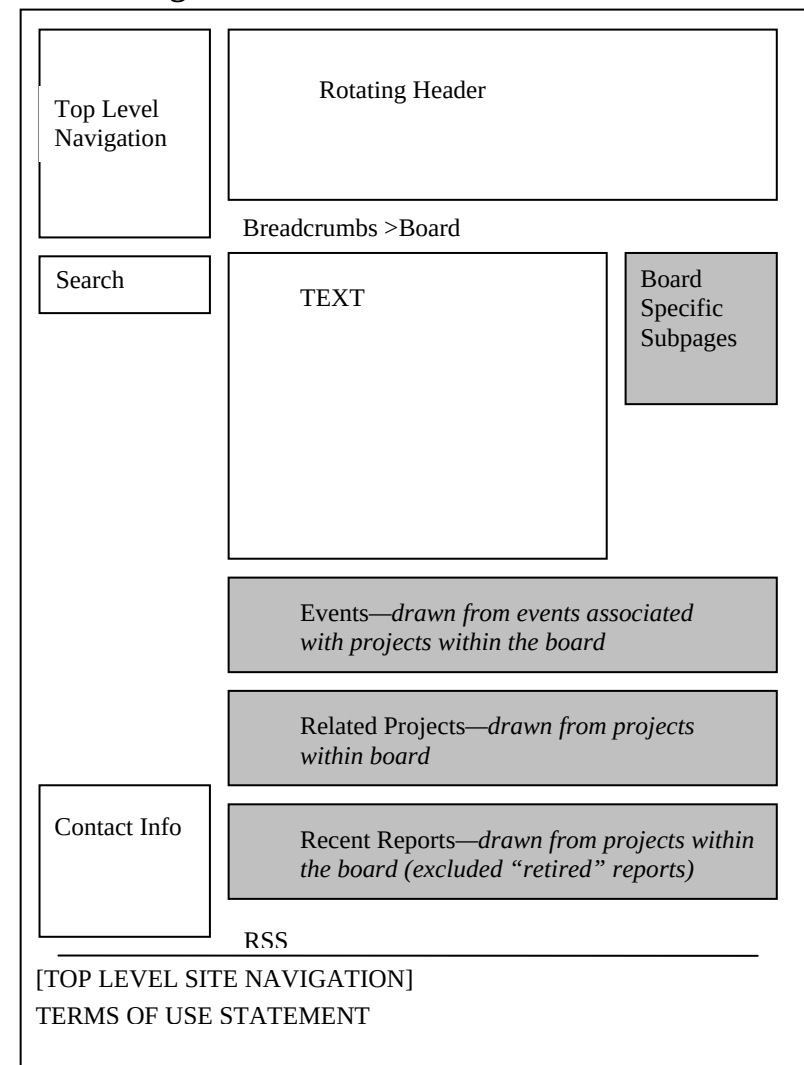
Static Content

Dynamically Generated Content
and its source

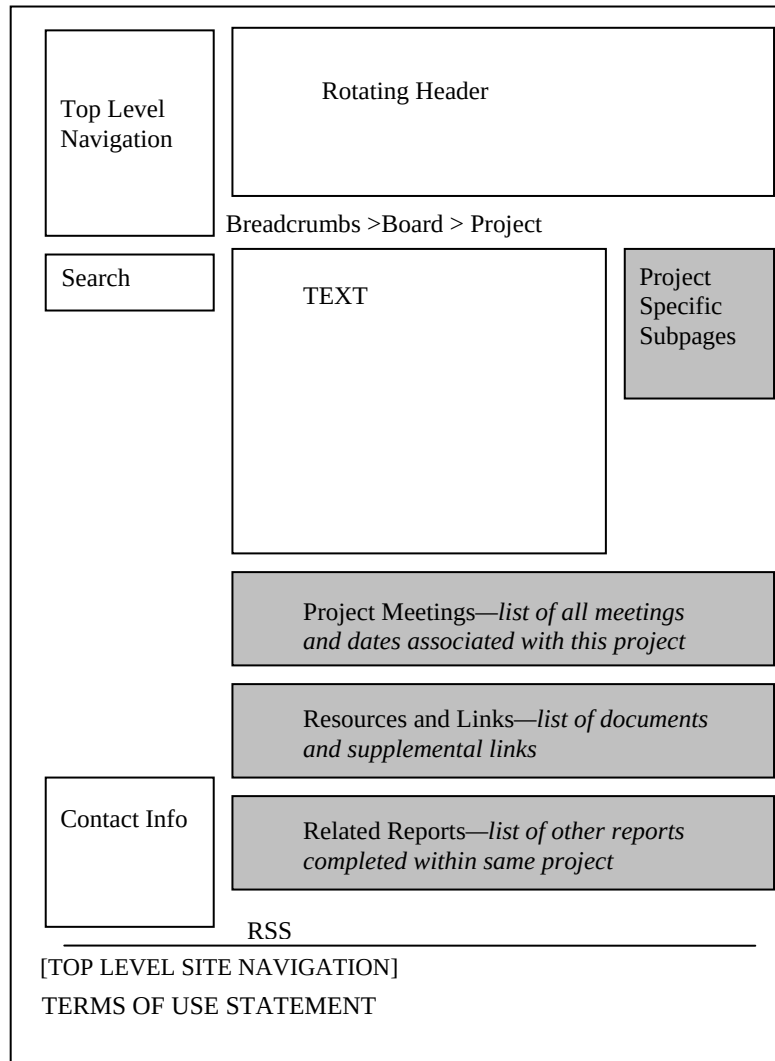
Home Page



Board Page



Project Page



Report Page

