



PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

## Response to Questions

### *PCORnet Communications Support*

Posted June 2, 2014

## General Funding

### **Q: Is there a budget range we should stay within for the 15-month scope of work?**

A: Applicants should budget for what they anticipate the work would cost, and provide a distinct cost estimate for each task in the RFP. Final proposals will be assessed based on technical merit and a competitive bid.

### **Q: What items within the scope are considered your top priorities for budget allocation?**

A: Each item in the scope of work is critically important to the success of this complex initiative. Certain items (features and other editorial content) will be needed throughout the period of performance. Other items (overall strategic communications plan; crisis communications plan) will be needed early in the contract, and would be PCORnet's immediate priorities.

### **Q: We will bid using our standard commercial rates. We do not have federally negotiated indirect cost rate arrangements, salary or fringe rates. Is that permissible?**

A: If the offeror has used these commercial rates on other government contracts, please provide this documentation. PCORI must be able to document that the rates are fair and reasonable.

### **Q: We understand that the relationship between PCORI and the winning vendor will be a cost-reimbursable contract with a cap. Does this include hard costs such as media buying and print production which is often billed at net 30, causing the vendor to "float" costs until paid by PCORI?**

A: The offeror may bill costs net 30 provided they are allowable. If these costs are related to the third-party vendor, the awardee must substantiate that the third-party vendor has been paid.

## About This Document

This document answers all of the questions received as of May 20<sup>th</sup>. Questions received between May 21<sup>st</sup> and June 4<sup>th</sup> will not be addressed.

Questions are listed exactly as they were received. Language that includes personal or organization identifiers has been redacted. General terms (underlined) have been substituted to protect privacy.

All submissions to this RFP are to be sent to [rfp@pcori.org](mailto:rfp@pcori.org)

The Patient-Centered Outcomes Research Institute (PCORI) is an independent organization created to help people make informed healthcare decisions.

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**Q: What is the projected budget for this engagement? If a specific budget is not identified do you have a range in mind?**

A: Applicants should budget for what they anticipate the work would cost, and provide a distinct cost estimate for each task in the RFP.

**Q: Is there a budget set aside for this project? Should we submit a retainer + expenses budget or an hourly rate budget?**

A: Hourly rate budget plus expenses.

**Q: What is the budget for this project? There are a lot of variables with video and other services that can make the budget range greatly. Even a range will help us in determining the most efficient and effective services.**

A: Please refer to previous answers to this question. A cost estimate for each task in the RFP would be considered responsive.

**Q: Or, if you are unable to give us the budget: how about giving us something really specific to bid on? That way you can compare each submittal accurately.**

A: We ask each applicant to provide their most reasoned estimate for each task, based on past experience.

**Q: On page 13 of the RFP, you indicate that the “budget should include the organization’s regular, approved salary and fringe rates” and note “any and all indirect fees must be fully supported with applicable documentation (e.g., copies of federally negotiated indirect cost rate agreements) and be subject to verification and audit.” [redacted] has a GSA-approved contract that has been evaluated and audited. Can we meet your financial requirements if our team proposes rates that are 3% above our GSA Rates and provides you with the appropriate documentation?**

A: GSA rates are adequate justification, with an explanation as to the need for the 3% escalation.

## **Collaborative Projects**

**Q: Are there any existing partnership prospects we should be aware of for outreach/engagement planning purposes?**

A: Not at this time.

**Q: Are there existing events already supported by PCORnet that should be taken into consideration?**

A: Yes. We have a number of events under discussion that the successful contractor will be expected to assist with as needed and appropriate, pending the development of a broader event plan.

**Q: Does PCORI have any specific media or corporate partnerships that should be leveraged?**

A: Nothing permanent, though we do support specific, appropriate editorial initiatives, such as journal theme issues and selected professional events.



**Q: Priority partner networks or locations?**

A: PCORnet's partner networks are key to this work. Please refer to the description of these networks on PCORnet.org.

**Q: How does PCORI envision the contractor selected under the RFP to collaborate with the existing communications contractor for PCORI?**

A: The contractor selected under this RFP will be expected to work in close collaboration with all parties charged with overseeing PCORnet communications tasks and broader PCORI communications tasks to the extent that they intersect, including PCORI staff, PCORnet CC staff, and PCORI's current or any future communications consultant.

**Q: Will the selected contractor have regular contact with the 29 partner networks in executing the deliverables outlined in the RFP or will the contractor work through PCORI's Program Officer and/or Communications Director? For example, will the contractor need to have regularly scheduled meetings with the 29 partner networks?**

A: The contractor will interface primarily with the PCORI Program Officer and Communications Director. There may be opportunities for the selected contractor to communicate with the full network, for example, during a webinar on a topic of interest. However, the contractor will not have independent, regular calls with the 29 individual networks.

**Q: Will there be partner network/grantee meetings or other similar meetings organized by PCORI/PCORnet that the selected contractor should account for – in terms of attendance, facilitating sessions, information gathering, etc.?**

A: Yes, as noted above, there will be four partner network meetings and two-four public meetings. The contractor will provide communications support such as dissemination; however, the contractor will not be on point to facilitate meeting sessions.

## **Communications Support - Roles and Responsibilities**

**Q: For scope of work items #5, #6 and #7, we assume you are seeking an approach for the type of work described versus a full plan for each. Can you please confirm?**

A: Correct. PCORI would want to understand how the applicant would approach the work as it is described in the RFP.

**Q: Is there an incumbent recently or currently providing communications support for PCORnet or PCORI? Have they been invited to participate in this RFP process?**

A: PCORI has an internal communications team as well as support from Golin Harris for overall organizational communications. As described in the RFP, PCORnet includes a Coordinating Center that provides support for internal communications. The work of PCORnet is distinct from the overall PCORI communications activities. The RFP was posted publicly.



**Q: Can you please provide more information on which audiences are primary vs secondary audiences?**

A: PCORnet is a highly visible research initiative with many constituencies interested in its development and progress, including the research community, the public, other funding agencies, policy makers, and health systems. Communications materials will need to be tailored for and attuned to the needs of a specific audience at a given time: a research conference, a feature story in the media, etc.

**Q: Can you please share information on any existing internal communication channels/publications in use? How effective are these in engaging internal audiences? How often do you envision communicating PCORnet updates/information to your internal audiences (weekly, monthly, quarterly)?**

A: PCORnet's Coordinating Center is responsible for internal communications with network partners. The Coordinating Center is in communication with the network at least weekly.

**Q: To what extent will your member networks be involved in this public-facing initiative?**

A: The partner networks of PCORnet are the cornerstone of the initiative. Much of their work will be the source of news and information about PCORnet's development.

**Q: Are there any upcoming key milestones/announcements that could be leveraged for the strategic communications and crisis communications planning efforts?**

A: For planning purposes, applicants should anticipate that, during the period of performance, PCORnet will be making public announcements related to relevant topics.

**Q: Are there plans/milestones related to each of the member network agreements that we should take into consideration for planning purposes?**

A: Not specifically, no. PCORI's program staff will interface with the selected contractor during the period of performance to identify activities of the partner networks that may be pertinent to overall PCORnet communication needs.

**Q: What channels do you currently use to create consistency between the 29 partners? Intranet, etc.?**

A: PCORnet communicates with its partner networks via several channels, including email, an internal website, conference calls, and face-to-face meetings.

**Q: Have you done live or virtual events previously? What kind of events? What worked, what didn't?**

A: PCORnet has held in-person meetings and conducts webinars on a recurring basis on topics of interest, such as engaging patients in research. Primarily, these events have involved our partner networks and others in the research community. PCORnet's kickoff meeting was open to the public via webcast. The typical considerations for live and virtual events (reach, ease of connectivity) are the same for PCORnet as they would be for any other event. PCORI as a whole has a long-standing history of doing live and virtual events and a good understanding of how to plan these to achieve specific goals.

**Q: Who will be the main spokesperson talking to media from PCORI?**

A: There are several principals in leadership positions in the PCORnet initiative. The spokesperson may vary based on the media outlet and the topic.



**Q: Have you done any research on the communication needs of your partners?**

A: No formal research has been conducted, though we are very aware that the needs of each audience will vary.

**Q: Can you give us examples of the type of events you were thinking of under deliverable #5? Conferences? Media events? And what are the audiences for these events?**

A: During the period of performance, we anticipate several different types of events, including four meetings of network partners and two-four public events/roundtables on topics of interest to the research community.

**Q: Can you expand on the scope of event planning and development? Would this be considered meeting management such as Steering Committee meetings for PCORnet along with any other needed PCORnet meetings typically held in the DC area. Meeting management activities being; securing rooms/hotels, logistics, liaison with facilities and CC teams, menus, transportation, everything needed for planning on-site meetings.**

A: See previous answers to similar questions. During the period of performance, there will be four network meetings and two-four public events requiring communications support. The Coordinating Center will be handling logistics and planning.

**Q: Would event planning also include Communications support/activities at these meetings, to support promotion of meeting in media and within network, dialogue during the meeting with live tweeting, engagement activities, and follow-up in media and within network after the meeting?**

A: Yes, these communication support activities are within the scope of the RFP.

**Q: The RFP includes mention of internal communications. Who is the internal audience? Is it the staff of PCORnet, PCORI or the staff of the partner networks?**

A: The PCORnet Coordinating Center's Program Management Office is handling internal communication with the PCORnet partner networks, PCORI program staff, and the other members of the Coordinating Center (i.e., those who are part of the Coordinating Center but not in the Program Management Office).

**Q: Will the selected contractor execute and oversee PCORnet's social media assets (Twitter, Facebook, etc.) after plan development or will execution be conducted by PCORI staff?**

A: The contractor will be tasked with developing the strategic communication approach, including a social media plan. The execution would be managed by the PCORnet Coordinating Center and PCORI Program Officers and communications staff, with implementation as agreed to by the responsible parties based on the communications plan.

**Q: Will the selected contractor be responsible for developing/building and maintaining communications assets such as a PCORnet blog?**

A: Yes, we expect that the contractor will be working with PCORnet to develop a blog or similar assets.



**Q: Will this contract include promotion of your first clinical trial scheduled for September 2015?**

A: Yes, we would expect that this promotion opportunity will be in scope for this RFP.

## Staffing

**Q: Have you previously worked with any small to mid-size firms?**

A: Yes.

**Q: Are there any specific staffing needs and/or team size you are looking for?**

A: We have not specified staffing/team size. This is the decision of the applicant.

**Q: Besides the information you ask for, can you explain the difference between 4. Corporate Qualifications and 5. Past Performance of the Technical Proposal?**

A: 4. Corporate Qualifications – The offeror will describe how it is qualified to meet the requirements of this project. 5. Past Performance – the offeror will provide examples of recent/past clients and describe how the requirements compare to those of this project.

**Q: Are there any requirements or limitations on what type of subcontractors can be used on this project?**

A: Subcontractors must be approved by PCORI and not be debarred from government contracts.

## Other

**Q: For potential live and virtual events, who are you looking to invite/attract?**

A: It depends on the topic. Some of the content may be most relevant to the general public; other events may be geared to the research community. The selected contractor will need to be comfortable working with multiple audiences with different needs and perspectives.

**Q: Do you require that the agency/firm have an office location in D.C.? Or multiple office locations nationally, and if so where?**

A: We are not stipulating the agency's location.

**Q: Can you provide any past crisis scenarios that the organization has encountered?**

A: As an organization, PCORI is a recurring topic in the media, in part because it was funded through the Affordable Care Act and conducts comparative effectiveness research. Our funding origins and type of research can sometimes generate vigorous responses and intensive scrutiny. PCORnet, the research network for which this RFP was issued, has not encountered what would be considered to be "crisis" scenarios as yet.

**Q: Can you prioritize your target audiences?**

A: The target audience may vary based on the content/topic.



**Q: How many in-person network meetings are planned for this contract period and where will they be located? If you have specific scheduled meetings, can you share those also?**

A: At this time, there are four in-person network meetings planned during the period of performance, occurring in the Washington, DC, area. These will occur in September 2014, November 2014, February 2015, and June 2015. Additional meetings/events are anticipated but have not been scheduled.

**Q: The network awards, including the coordinating center, were announced in December 2013. Since that time, who has provided communications services for PCORnet?**

A: The Coordinating Center has supported communications work such as development of a public website and private intranet, and regular communication to partner networks. PCORI's communications staff, with the assistance of its communications contractor Golin Harris, as requested, has provided ad hoc support to date for message development, meetings/event planning, and media relations.

**Q: Is there an opportunity for an ongoing relationship beyond the period identified in the RFP?**

A: Nothing can be stated definitively at this point. However, were such an opportunity to arise, it would be contingent on the continuation of the PCORnet initiative and the satisfactory performance of the contractor.

**Q: Is there an incumbent agency performing some or all of this work for you now?**

A: PCORnet communications support has been provided by PCORI's internal communications team and the Coordinating Center.

**Q: Will an in-person presentation be a part of the review process or will the decision be made solely based on the RFP response?**

A: At this time, we do not anticipate an in-person presentation; however, PCORI reserves the right to interview finalists. Interview may be by telephone or in-person.

**Q: Is there any geographic requirement for the agency that is selected? Does they agency need to be physically located close to PCORI?**

A: No, there is no geographic requirement.

**Q: Are their specific audiences or areas you'd like to reach within the identified audiences of public, professional and media? For example, are you looking to reach the general mass media or are more focused on healthcare specific media?**

A: Please see responses to similar questions above regarding target audiences. In short, there are many distinct audiences for this initiative, and the outreach and content strategies will need to be tailored accordingly.

**Q: What does PCORI see as its three greatest successes in the area of communications to date?**

A: This RFP is for PCORnet, not for PCORI. Having said that, PCORI is well known for its thought leadership in the involvement of patients and other stakeholders in research, and for conducting comparative effectiveness research on outcomes that matter to patients.



**Q: What does PCORI see as its three biggest challenges in the area of communications today?**

A: Again, this RFP pertains to PCORnet. Among the communication challenges related to PCORnet is that, initially, it is building infrastructure for research rather than conducting research. Explaining this to a nontechnical audience in particular will require a carefully considered approach. Additional key communications needs include helping our audiences understand the following:

1. What PCORnet is, why it is needed, and why various audiences should care
2. Why PCORnet expects to succeed where others have not
3. How PCORnet will address the many complex and potentially controversial issues associated with the use of “big data” in health research.

**Q: Please clarify what is included in the 30 page limit listed on the checklist on page 18.**

- a. Does the 20 page limit for "Proposed Project Team Members" refer to the length of the total resumes in the appendix, or for a narrative description of the team's expertise within the 30 page limit? This 20 page limit does not seem to appear on the check list on page 18.
- b. Is the 2 page limit for the "past performance synopsis" per project or overall? And do these pages fall within the 30 page limit on the check list on page 18?
- c. The 10 page limit for “Corporate Experience” does not seem to appear on the check list on page 18. Should that be provided in an appendix?

A:

- a. Résumés are part of the Appendix, and do not count toward the page limit for the Proposed Project Team Members. The page limit is specified for summarizing the proposed team members' capabilities and expertise.
- b. Provide a two-page synopsis per project, limited to three projects completed in the last five years.
- c. This can be provided either as part of the appendix or as part of the Technical Proposal. Either way, please adhere to the 10-page limit.

**Q: On 5. Past Performance of the Technical Proposal, what do you mean by “do not provide general information on performance”? Do you mean results?**

A: Please provide specific challenges that were encountered and how these challenges were met or issues were resolved.

**Q: For what kind of crises do you envision needing a crisis communications plan? Human subject morbidity and mortality, security/privacy breaches, regulatory changes and governance, all of the above?**

A: PCORnet is building infrastructure, initially, rather than conducting research. Thus, we do not anticipate that human subject morbidity/mortality issues will arise. We are developing policies and processes for working with health data, including data security and privacy, and we anticipate that we will be developing public-facing statements related to clinical trials and oversight of human participants in research.



**Q: Can you elaborate on why you want a communications program through Sept 2015 when the PCORnet program also sunsets in that month? Is there a next phase of network activity for which you'd want the 15-month communications program to create a favorable environment?**

A: At this point, we are expecting and planning for a second phase of PCORnet, contingent on satisfactory progress of the Phase I initiative, and also subject to approval by PCORI's Board of Governors. The alignment of the communications program and the Phase I timeline is intentional in that these two funding streams would end at the same time.

**Q: Do you have a geographic preference for where your day-to-day contact at your selected agency is based?**

A: No, PCORI does not have a geographic preference for the agency location.

**Q: Contract period states till end of September 2015 but the contract with other groups in PCORnet is till October 31, 2015? Is end date correct?**

A: The end date as stated in the RFP is correct.

**Q: Has PCORnet developed any messaging or conducted any message testing to this point? If so, will the selected contractor be modifying the existing work or will they develop and test new messaging?**

A: No formal message testing has been undertaken to date. Informal interactions and input from our PCORnet partners have provided some insights into messaging to this point. For certain messaging a more formal approach may be beneficial.

**Q: The RFP lists research and healthcare communities and the general public as the audience for this effort. How would you prioritize these audiences? Within each, are there sub-targets that are more of a priority than others?**

A: Please refer to similar responses above regarding priority audiences. The main audience may vary according to the topic.