



PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

## Response to Questions

### ***Analytic and Operational Support for the Engagement of the Public and Patients RFP***

Posted June 22, 2017

#### **Task Order Price Ranges**

The following price ranges will apply to Task Orders (TOs) issued under this IDIQ:

- Small Projects (TOs): <\$150,000
- Medium Projects (TOs): \$150,000 – \$1,000,000
- Large Projects (TOs): \$1,000,000 – \$3,500,000.

For the TOs issued concurrently with this IDIQ, the following ranges are estimated:

- TO 1: Small
- TO 2: Small
- TO 3: Medium
- TO 4: Large.

**Q32: On page 22, “Submission Guidelines,” it describes the number of volumes and the page limits for the proposal. Are these instructions only for the base IDIQ or do they include the 4 Task Order proposals? In addition, do we do separate proposals for each domain (i.e., Science of Engagement, Economic Modeling, etc)? In other words, are separate proposals being requested for:**

- 1) Each of the 5 domains; and**
- 2) Each of the 4 task orders provided?**

**If yes, does each domain and each of the task orders require a full separate proposal (3 volumes each x 9 proposals = 27 volumes), including Past Performance references? If the base proposal includes all 5 domains as described in the “Submission Guidelines” starting on page 22, would the 35 pages for the Technical Proposal be sufficient to describe describe each domain or could we increase the number of pages?**

**A32:** PCORI expects separate applications from Offerors: one application in response to the IDIQ RFP and one application for each task order on which they are competing. Offerors may apply for more than one task order. Any task order application must be in a domain for which the Offeror is competing under the IDIQ RFP.

Page limits listed on page 23 of the RFP document reflect expectations for an IDIQ bid. Please refer to the answer to Q7 for information regarding task order page limits.

Page limits listed on page 23 of the RFP document reflect expectations for the lengthiest IDIQ bid PCORI expects to receive. If an Offeror bids on fewer than five domains and wishes to submit the maximum number of pages, that is acceptable, but regardless of how many domains are being bid on, we expect Offerors to not exceed the page limits provided.

**Q33: Page 3 of the RFP states: “PCORI expects offerors to demonstrate the capacity to provide professional services in at least two of the following domains..”**

**Page 10 states: “Contractors must be able to perform all activities described in the IDIQ SOW. . .”**

**Are offerors being requested to select at least 2 domains or must we respond to all domains?**

A33: PCORI is interested in contracting with vendors who demonstrate experience and competence in at least two domain areas outlined in the IDIQ. Each offer will be considered on its merit and preference will not necessarily be given to those who qualify for more than two domain areas if they offer unparalleled services in the two that they have applied for.

**Q34: If an offeror decides to select only 2 domains, are offerors required to submit proposals on the task orders which are not within the domains they propose?**

A34: No, if the Offeror is bidding on an IDIQ domain related to one of the issued task orders, the Offeror *may* but is not *required* to apply for related task orders to be competed concurrently.

**Q35: It is our understanding that Task Orders 1 and 2 fall within Domain 3, Environmental Scans, Literature Reviews & Issue Briefs; that Task Order 3 falls within Domain 1, Science of Engagement; and that Task Order 4 falls within Domain 4, Education/Training. Would you please verify whether those assumptions are correct? If they are not, which domains would they be in?**

A35: Yes, those assumptions are correct.

**Q36: In the Introduction, “Opportunity Snapshot,” page iii, it says that the IDIQ will be a cost-reimbursable contract, but on page 11, under “Task Orders,” it says that Task Orders may be a firm fixed price, time and material, or cost reimbursable. Would you please verify which type of contract you would like us to bid on the base contract, by domain, and each Task Order?**

A36: PCORI anticipates that task orders will be cost reimbursable agreements. However, PCORI may issue future task orders on a firm fixed price or time and materials basis.

**Q37: For Past Performance we are required to ask our references to fill out Appendix A: Past Performance Questionnaire. If we have current Contractor Performance Assessment Reporting System (CPARS) evaluation forms from government agencies, can we include those in our proposal instead of asking government clients to fill out Appendix A?**

A37: For consistency, PCORI requires that the form found in Appendix A be completed and submitted. Appendix A may be completed by the Offeror if accompanied by an attached CPARS reports.

**Q38: If a contractor applies for an IDIQ domain with a corresponding Task Order, does the contractor also need to bid on the Task Order to be considered for the IDIQ domain?**

A38: No, if the Offeror is bidding on an IDIQ domain related to one of the issued task orders, the Offeror *may* but is not *required* to apply for related task orders to be competed concurrently. However, an application for a task order will not be considered without a corresponding application for the domain that is under.

**Q39: If a contractor is unsuccessful in bidding on one of the four Task Orders, will that contractor still be considered for the corresponding IDIQ domain?**

A39: Yes.

**Q40: Does PCORI prefer contractors to bid on all/multiple domains or to focus on just two domains?**

A40: PCORI is interested in contracting with vendors who demonstrate experience and competence in at least two domain areas outlined in the IDIQ. Each offer will be considered on its merit and preference will not necessarily be given to those who qualify for more than two domain areas if they offer unparalleled services in the two that they have applied for.

**Q41: Under which domain(s) are Task Order #3 and Task Order #4 categorized?**

A41: Please refer to the answer to Q35 for information regarding this question.

**Q42: What are the page limits for responding to each Task Order? Are there other submission requirements for responding to the four Task Orders?**

A42: Please refer to the answer to Q7 for information regarding this question.

**Q43: Does PCORI want the contractor to bring a logistics coordinator on board, or does PCORI already have a meeting logistics coordinator the organization prefers to work with?**

A43: PCORI anticipates the contractor will have a logistics coordinator and any other personnel or subcontract relationships in place to compete and complete successfully any task orders bid under the Meeting Facilitation and Support domain.

**Q44: Does PCORI prefer that the advisory committee members be members of existing or prior PCORI advisory committees? (In reference to TO 4).**

A44: No, PCORI has no preference on this matter.

**Q45: Should the contractor budget funds for compensation of advisory committee members? (In reference to TO 4).**

A45: Yes, please refer to PCORI's Framework on Compensation for further guidance on this question.

**Q46: PCORI mentions in several locations that it award multiple IDIQ agreements. How many IDIQ awards does PCORI anticipate offering?**

A46: PCORI does not have a specific anticipated number of IDIQ awards it intends to offer.

**Q47: Under Technical Approach, PCORI states that "Offerors must provide a detailed plan...and a detailed draft project plan..." Do these statements refer to the same plan? If different, how do they differ in regard to required content, delivery, etc.?**

A47: The "detailed draft project plan" is considered a portion of the overall "detailed plan," which should also include a description of the proposal approach and other items outlined in the section "Technical Approach" on page 15.

**Q48: Under submission guidelines, should we assume that we submit 3 volumes (Administrative, Technical, and Price) for the IDIQ and each Task Order (15 total volumes)? Do the page limit guidelines apply to the IDIQ and each task order proposal?**

A48: PCORI expects separate applications from Offerors: one application in response to the IDIQ RFP and one application for each task order on which they are competing. Offerors may apply for more than one task order. Any task order application must be in a domain for which the Offeror is competing under the IDIQ RFP.

Page limits listed on page 23 of the RFP document reflect expectations for an IDIQ bid. Please refer to the answer to Q7 for information regarding task order page limits.

**Q49: Under Type of Agreement it is stated, “PCORI encourages the use of Contract teaming arrangements and/or subcontractors to ensure that project teams have the necessary expertise to accomplish the work.” Will IDIQ holders be permitted to work with partners not on the overall IDIQ contract if a specific task order calls for specific skills or expertise that may call for an additional partner? Please confirm if we can add subcontractors after award of the proposal or if we are held to only those proposed at the IDIQ and/or task orders levels.**

A49: PCORI will allow IDIQ holders to work with subcontractors not on the overall IDIQ. It is incumbent upon the Offeror to demonstrate in the IDIQ application that it can compete and complete task orders successfully. Existing relationships upon which the Offeror will draw is a helpful and important variable.

**Q50: Both sub-tasks 3.1 and 3.2 reference a “publishable report” and “presentable multimedia versions of findings” as deliverables. Can PCORI clarify what type of publication (e.g., 508-compliant formal report, journal manuscript) and what type of presentation (e.g., animated slide presentation, video) is contemplated?**

A50: PCORI expects the Offerors to propose presentation and publication formats as a part of deliverable 3.1d. All PCORI deliverables must be compliant with Section 508 of the Rehabilitation Act of 1973 and can be easily accessible to individuals with cognitive or physical challenges.

**Q51: We assume that we should submit three past performance questionnaires total that best cover the scope of work under the IDIQ and TOs, is this correct? .**

A51: Offerors must include at least 3, and at most 5 past performance review forms (see Appendix A) to be eligible for IDIQ inclusion.

Offerors may not include past performance reviews from PCORI, or use PCORI staff as references on past performance, although prior work completed for PCORI should be included as a note in past experience where applicable.

**Q52: If we are including subcontractors or consultants on our team, are we required to submit past performance references for each team member? Can all three references be for the prime contractor? Regarding past performance, can PCORI clarify if the “within the last three years” end date applies to all projects included in the past performance section or just the three past performance references that the contractor will submit?**

A52: The past performance questionnaire for the IDIQ and individual task orders regards the prime contractor. However, PCORI requires that each subcontractor contributing 20 percent or greater to the total project effort submit a past performance questionnaire, regardless of whether the subcontractor is an individual, corporate, or other entity.

“[W]ithin the last three years,” for past performance applies to all projects in the past performance section and past performance references.

**Q53: Regarding past performance questionnaires – are offerors able to use other units within PCORI for past performance questionnaires?**

A53: Offerors may not include past performance reviews from PCORI, or use PCORI staff as references on past performance, although prior work completed for PCORI should be included as a note in past experience where applicable.

**Q54: Does PCORI have a sense of the volume and timing of Task Orders likely to be sent to approved contractors in each of the domains?**

A54: Not at this point, although we can definitively share that additional task orders will be issued under each domain.

**Q55: Under 3.1c—Conduct the Study, it is stated that, “Although some interviews should take place in person, this will not be required for all. Proposed alternative methods for individual interviews are welcome with justification.” Does PCORI have a sense of the number of interviews that are required to be conducted in-person and/or the criteria that will determine interview mode (i.e., in-person vs. remote)?**

A55: Offerors are encouraged to propose the optimal design for the task. PCORI encourages innovation in the Offeror’s approach, so long as the approach accomplishes the stated goals for the task, and is methodologically sound.

**Q56: The table on page14 lists out both Organization and Staffing, and Project Management Plan. However, only the Project Management Plan is included on page 15. Can PCORI provide more detail on the evaluation factors that will be considered for the Organization and Staffing section? How should offerors differentiate the two sections?**

A56: Please include the following information in the Organization and Staffing section, instead of the Project Management Plan section:

Please include an organization chart with named personnel that demonstrate reporting lines and areas of responsibility. Résumés shall be provided in an appendix for the named key personnel who demonstrate experience in similar positions on prior projects/contracts that are similar and relevant to the scope and complexity contemplated.

Personnel proposed must demonstrate core expertise in the tasks anticipated. If the use of teaming partners and/or subcontractors is proposed, clearly articulate their roles and demonstrate their relevant experience. The Project Management Plan shall describe the overall plan for organizing, staffing, and managing the tasks; how organization roles and responsibilities will be divided, decisions made, and work monitored; exceptions management; and assurance of quality and timeliness to meet PCORI’s requirements.

**Q57: Task A under Task Orders 1 and 2 asks the vendor to identify and define chronic conditions “based on PCORI’s taxonomy.” Does ‘taxonomy’ refer to the criteria for searching PCORI’s studies online?**

A57: Taxonomy refers to an evaluation tool utilized by PCORI’s Evaluation & Analysis Department. This document will be made available to the Offeror(s) awarded Tasks 1 and 2.

**Q58: What is/are the expected data source(s) for Task Orders 1 & 2?**

A58: Please refer to the answer to Q20 for information regarding this question.

**Q59: Will the vendor be searching for and retrieving data sources as part of the portfolio analyses, or will PCORI be doing this step? (TO1 & TO2)**

A59: The vendor will be searching for and retrieving data sources as part of the portfolio analysis with the support of PCORI (guidance, consulting, and access to resources as needed).

**Q60: With regard to the timeline for deliverables (pages 29 and 32), is PCORI review factored into the timeline? In other words, will PCORI want to review and provide feedback on the proposed approach (due Oct 2), and if so, how much time will PCORI require to do so? (TO1 & TO2)**

A60: Yes, PCORI factored review and provision of feedback on the proposed approach. PCORI will respond with feedback within five (5) business days.

**Q61: With regards to the project requirements and needs assessments conducted by PCORI, does PCORI have an estimate of the number of project teams/number of individuals that will need to be trained in PCOR/CER research fundamentals? (TO4)**

A61: PCORI does not have an estimate of the number of trainees. Training in PCOR/CER fundamentals will be voluntary for PCORI's stakeholders, and all components will be publicly accessible.

**Q62: Please clarify the statement "The Contractor will perform the work in this task order without technical assistance from PCORI." Is this statement in reference to the technology platform for the training or the training content component as well? (TO4)**

A62: PCORI expects Offerors to have the necessary expertise in all content and any proposed technology platforms in order to successfully accomplish the work in the task order.

**Q63: Design the research fundamentals components: Since the needs assessment (Appendix A) is not stakeholder-specific, please clarify if the design requirements for specific audiences should be limited to findings from the environmental scan? (TO4)**

A63: PCORI expects that design requirements for specific audiences will be informed by findings from the environmental scan and Offerors' subject matter expertise in PCOR/CER and their understanding of PCORI and its stakeholders.

**Q64: Implement the team science program components: It appears that the unit for targeting training programs could include both research teams and individual members of a team. What is PCORI's estimate of the number of teams and/or individuals that require training in team science? Should we expect any overlap with the existing contract awarded to Westat to conduct Scientific and Lay training? (TO4)**

A64: PCORI does not have an estimate of the number of trainees. Training for research teams and individual team members working on PCORI-funded projects will be voluntary, and all team science training programs will be publicly accessible.

Task Order #4 will not overlap with any existing contracts that PCORI has in place.

**Q65: Does the page limit of 4 pages for the Price Proposal apply to the IDIQ and to the Task Orders? Please consider increasing this limit.**

A65: PCORI requests for the purposes of the IDIQ that Offerors will provide a reasonable and justified pricing band or range for each domain. Labor rates, indirect costs, etc., are acceptable for justification. The goal of the IDIQ Price Proposal is to provide a good faith estimate of the range of project costs the Offeror can compete and complete successfully. We believe that four (4) pages should be sufficient to provide this information.

**Q66: The funding vehicle/contract type for tasks 1, 2, and 3 are not stated. Please state whether each individual task order proposals should be FFP, T&M, or Cost reimbursable.**

A66: Please reference the response to Q36 for information on this question.

**Q67: A table is mentioned for pricing, but is not provided. May the contractor use its in-house templates, to ensure all the required detail is provided? (TO4)**

A67: Yes.

**Q68: The title of this section “Potential for Organizational Conflicts of Interest and Personal Conflicts of Interest” says it pertains to Personal Conflicts of Interest (PCOI), however, the section solely references Organizational Conflict of Interests (OCI). Please clarify a) If there is a requirement for PCOI and b) If an attestation to the OCI/PCOI is required in the proposal or solely upon award?**

A68: The Contractor must submit any COI, personal or organizational, in their proposal.

**Q69: How many IDIQ awards does PCORI envision awarding?**

A69: Please reference the response to Q46 for information on this question.

**Q70: With the announcement of awards, will PCORI announce which of the 5 domains awardees have been qualified for?**

A70: PCORI will announce publicly the overall list of awards made and the specific domains for which applicants qualified.

**Q71: Can a subcontractor to a prime be bid as prime on a TO?**

A71: No.

**Q72: How many IDIQ awards does PCORI envision awarding?**

A72: Please reference the response to Q46 for information on this question.

**Q73: For Task Orders #1 and #2: How will PCORI present their portfolio of current projects? As separate research protocols or aggregated in a searchable database?**

A73: Please reference the responses to Q57 and Q58 for information on this question.

**Q74: Regarding Task Orders 1, 2 and 3, can PCORI please specify a preferred contract type.**

A74: Please reference the response to Q36 for information on this question.

**Q75: Regarding Task Order 4, regarding the following statement “Learner access to learning content-negotiate with the Contractor to determine where the content will be housed”, how should the contractor take this into consideration in the cost proposal?**

A75: Offerors should assume that they will house all learning content on a publicly accessible digital delivery platform and PCORI will provide a link to this platform on its website.

**Q76: Regarding Task Order 4, are there any restrictions or preferences for the types of multimodality training tools to be employed for training purposes? If so, please specify which modalities are preferred.**

A76: PCORI does not have any preferences or restrictions for the types of multimodality training tools that are used. PCORI is most interested in the justification for the choice of training tools.

**Q77: Can PCORI give an estimate of how many task orders may be issued annually under the IDIQ?**

A77: Not at this point, although we can definitively share that additional task orders will be issued under each domain.



**Q78: Regarding the following statement under “Environmental scans, literature reviews and issue briefs:” Contractors are not sought to, and will not conduct full systematic reviews, evidence syntheses, or meta-analyses. Does PCORI envision the Environmental scans, literature reviews and issue briefs to include an analysis, synthesis and presentation of the body of literature (usually a targeted review) without the critical appraisal, dual abstraction and data extraction tables that would accompany a systematic review?**

A78: Yes.

**Q79: On page 62, related to task 2h, the description refers to task 10.0. Please clarify which task 10.0 refers to.**

A79: “Task 10.0” should read “Task 2d.” Thank you for catching this.

**Q80: Should Offerors bid as many of the five SOW areas as they qualify for to be permitted to bid all of the subsequent Task Orders that will be released?**

A80: Yes. However, each offer will be considered on its merit and preference will not necessarily be given to those who qualify for more than two domain areas if they offer unparalleled services in the two that they have applied for. Ultimately, no, there is no advantage to submitting for more domains than you are qualified for. In fact, it is better to compete where you know you have strength rather than submitting a poor response to a particular domain.

**Q81: When task orders are released, will successful IDIQ Holders be able to bid only on whichever of the 5 task areas they bid in the IDIQ RFP?**

A81: Yes.

**Q82: Is there a specific format requested for the publication-ready reports, or a specific program (e.g., MS Word)? Are professional desktop publishing, layout, or graphic skills required? (Environmental Scans, Literature Reviews, and Issue Briefs)**

A82: Desktop publishing skills are not required. By publication-ready, PCORI means for final deliverables to be returned in a file format, preferably MS Word, that PCORI can easily drop into its own existing publication formats (one-pagers, issue briefs, etc.). Text and accompanying tables and charts, when necessary, that are professional, clean, and require minimal copyediting is the requirement.

**Q83: In the IDIQ portion for Education/Training, there is no definitive request for specific authoring software or hardware for training. Is there a preferred software or development platform? Are the bidders supposed to answer the 4 task orders in our Technical Approach section since they will be awarded simultaneously with the IDIQ contract?**

A83: PCORI does not have a preference for specific authoring software or a development platform.

PCORI expects separate applications from Offerors: one application in response to the IDIQ RFP and one application for each task order on which they are competing. Offerors may apply for more than one task order. Any task order application must be in a domain for which the Offeror is competing under the IDIQ RFP.

If the Offeror is bidding on an IDIQ domain related to one of the issued task orders, the Offeror *may* but is not *required* to apply for related task orders to be competed concurrently. However,



an application for a task order will not be considered without a corresponding application for the domain that is under.

Page limits listed on page 23 of the RFP document reflect expectations for an IDIQ bid. Please refer to the answer to Q7 for information regarding task order page limits.

**Q84: If the offerors are to bid the four task orders in their technical volume, then 1) what are the requirements to bid these? 2) what are the evaluation criteria to match each Task Order? 3) What are the additional page counts per each of the 4 task orders?**

A84: Please refer to the response to the previous question.

**Q85: Is there a proposed template that you would like contractors to use for pricing and labor category descriptions or should we create our own template?**

A85: There is no template for this volume of the submission.

**Q86: None of the Task Order Requests include the type of contract (i.e., FFP, T&M, Cost Plus). Please provide this information for pricing purposes.**

A86: Please reference the response to Q36 for more information on this question.

**Q87: Do page lengths listed on pages 22 and 23 (Volume I, II, and III) apply to the offeror's IDIQ response alone? If yes, what is(are) the page limit(s) for each TO?**

A87: Page limits listed on page 23 of the RFP document reflect expectations for an IDIQ bid. Please refer to the answer to Q7 for information regarding task order page limits.

**Q88: Does PCORI anticipate funding labor hours for the IDIQ response, that is, independently of labor hours funded for each TO?**

A88: PCORI requests for the purposes of the IDIQ that Offerors will provide a reasonable and justified pricing band or range for each domain. Labor rates, indirect costs, etc., are acceptable for justification. The goal of the IDIQ Price Proposal is to provide a good faith estimate of the range of project costs the Offeror can compete and complete successfully.

**Q89: Is PCORI requesting three volumes for the IDIQ and three volumes corresponding to each TO for which an offer is made? If so, can PCORI confirm the total number of volumes that will be required for an offeror responding to one, two or more TOs?**

A89: Please reference the response to Q32 for more information on this question.

**Q90: Could PCORI provide further detail on what is meant by the following sentence on page 13 of the RFA: "The first four orders will represent the Offeror's mix of labor categories and hours."**

A90: PCORI expects that the Offeror will produce a good faith application that is representative of the Offeror's requirements to complete potential future task orders in these domains.

**Q91: Has an Independent Cost Estimate (ICE) been developed for the IDIQ and each TO? If yes, what is the ICE for the IDIQ and each TO? If no, can PCORI offer guidance on expected level of effort for the IDIQ and each TO?**

A91: An ICE has not been developed for the IDIQ or the TOs. PCORI asks that Offerors provide the expected level of effort that they and any additional staff members will commit to the project(s) in their Volume 3: Price Proposal. PCORI does not have specific expectations regarding the level of effort proposed by an Offeror.

**Q92: Page iii of the RFP notes that this will be a cost reimbursable contract. Could PCORI please confirm that this is for an IDIQ agreement with multiple contract types?**

A92: Please reference the response to Q36 for information on this question.

**Q93: Can PCORI advise as to what the anticipated task order type is for TO Request #1-3? (fixed price, T&M, etc.)**

A93: Please reference the response to Q36 for information on this question.

**Q94: Recognizing the initial four task orders do not cover all five domains, please clarify the page limits and volumes an Offeror should submit if it is interested in applying for all four of the initial task orders (i.e., does PCORI expect the Offeror to submit administrative, technical and pricing volumes for the overall IDIQ opportunity, as well as for each individual task order?)**

A94: Please reference the response to Q32 for more information on this question.

**Q95: The RFP is clear Offerors are expected to be competent in at least two of the domains, but are Offerors required to submit for all four of the initial orders? If it is possible to submit for fewer than all four of the initial task orders, how will applying for all four or fewer than four impact the scoring?**

A95: PCORI expects separate applications from Offerors: one application in response to the IDIQ RFP and one application for each task order on which they are competing. Offerors may apply for more than one task order. Any task order application must be in a domain for which the Offeror is competing under the IDIQ RFP.

If the Offeror is bidding on an IDIQ domain related to one of the issued task orders, the Offeror *may* but is not *required* to apply for related task orders to be competed concurrently. However, an application for a task order will not be considered without a corresponding application for the domain that is under. The number of task orders bid on will not impact the overall score for an applicant.

**Q96: The RFP is clear PCORI welcomes consortia (i.e., Offerors with subcontractors). How should Offerors propose additional subcontractors in response to future task orders?**

A96: If the use of teaming partners and/or subcontractors is proposed, clearly articulate their roles and demonstrate their relevant experience. As with the IDIQ Project Management Plan, in responding to future task orders, an Offeror shall describe the overall plan for organizing, staffing, and managing the tasks; how organization roles and responsibilities will be divided, decisions made, and work monitored; exceptions management; and assurance of quality and timeliness to meet PCORI's requirements. The Offeror is to demonstrate how it will perform all of PCORI's requirements, objectives, overcome or mitigate constraints, and meet or exceed contract performance requirements.

**Q97: Page 16 of the RFP states: "Offerors are expected to provide two sets of pricing in their price proposal". The RFP is clear the first set of pricing is the overall base pricing. Please clarify what the second set of pricing would be (e.g., if distinct pricing proposal for each task order, could not there be more than two sets of pricing submitted by an Offeror?)**

A97: PCORI asks that Offerors provide the expected level of effort that they and any additional staff members will commit to the project(s) in their Volume 3: Price Proposal. PCORI does not have specific expectations regarding the level of effort proposed by an Offeror.

PCORI requests for the purposes of the IDIQ that Offerors will provide a reasonable and justified pricing band or range for each domain. Labor rates, indirect costs, etc., are acceptable for justification. The goal of the IDIQ Price Proposal is to provide a good faith estimate of the range of project costs the Offeror can compete and complete successfully.

**Q98: For the economic modeling domain, please provide any additional guidance on the relative balance of examining cost vs outcomes.**

A98: For the economic modeling domain, the main focus will be on modeling utilization and associated costs. It will be necessary to model certain health outcomes in order to predict utilization and costs, but it should not be necessary to model health outcomes in great detail.

**Q99: For Task Orders 1 and 2, can PCORI please provide an estimate of the number of studies to be included in the portfolio analyses for Care Coordination and Disease or Case Management, respectively.**

A99: PCORI anticipates approximately 40-60 studies will be included in these analyses.

**Q100: For Task Orders 1 and 2, what information about each included study will PCORI provide to the contractor as source material for categorizing and describing them?**

A100: Please refer to the answer to Q20 for information regarding this question.

**Q101: Would PCORI consider extending the periods of performance for Task Orders 1 and 2, especially if the number of included studies is large?**

A101: PCORI expects to receive applications that outline the necessary requirements for successful completion of each task order.

**Q102: What is the contract type for each Task Order?**

A102: Please reference the response to Q36 for more information on this question.

**Q103: Are there any specific rules/expectations regarding publication of results/findings from completed work.**

A103: Regarding Task Orders 1 and 2, please see the answer to Q82 above. Specifically, for Task 3, PCORI expects the Offerors to propose presentation and publication formats as a part of deliverable 3.1d. Task 4 deliverables are outlined in the task order, and will be further discussed at project kickoff.

All PCORI deliverables must be compliant with Section 508 of the Rehabilitation Act of 1973 and be easily accessible to individuals with cognitive or physical challenges.

**Q104: Do the page limits identified for each section of the proposal only apply to the IDIQ response, or do those include the responses to the first four task order requests?**

A104: Page limits listed on page 23 of the RFP document reflect expectations for an IDIQ bid. Please refer to the answer to Q7 for information regarding task order page limits.

**Q105: Under the Technical and Price proposals are there any guidelines for structure, e.g. the use of headers/sub-headers or a limit to the use of headers/sub-headers? Are there preferences for the structure of these sections?**

A105: No, but we request that Offerors be as responsive as possible to the criteria laid out.

**Q106: Does PCORI allow or encourage contractor partnerships with organizations or groups that are currently part of the PCORNet partner Network?**

A106: Contractor partnerships with organizations and groups currently part of PCORnet are allowable, but not preferred over partnership with organizations *not* a part of PCORnet.

**Q107: If not, what are the regulations regarding contractor collaboration with current PCORI partners?**

A107: Please reference the response above.

**Q108: On page 3 of the announcement it states that contracts must fulfill at least 2 SOW criteria. However on page 10 under "Type of Agreement:", it states that contactors must be able "to perform all activities described in the IDIQ SOW." Please clarify.**

A108: PCORI is interested in contracting with vendors who demonstrate experience and competence in at least two domain areas outlined in the IDIQ. Each offer will be considered on its merit and preference will not necessarily be given to those who qualify for more than two domain areas if they offer unparalleled services in the two that they have applied for.

**Q109: Is there an incumbent currently performing this work?**

A109: No, with one exception. PCORI does not have incumbent contractor(s) currently performing the work outlined in the IDIQ, except for one contractor performing limited services related to the economic modeling domain.

**Q110: Understanding PCORIs focus on engagement, does PCORI encourage the involvement of patient stakeholders in contract agreements?**

A110: Stakeholder engagement is not expected to complete TO 1 or TO 2. Stakeholder engagement is expected to complete TO 3, as outlined in the Task. TO 4 is the only task, of those released concurrently with the IDIQ, with the expectation of a stakeholder advisory board being developed and leveraged.

**Q111: If so, how have contractors engaged or involved patient stakeholders in assigned work or projects on past projects?**

A111: Contractors have engaged patients and other stakeholders in a variety of manners. PCORI expects Offerors to propose relevant and resonant opportunities for patients and stakeholders. PCORI encourages Offerors to review the Engagement Rubric and other materials related to engagement of patients and stakeholders.

**Q112: Does PCORI allow involvement of contractors as authors in briefs or manuscripts? For example, for the production of a literature review?**

A112: PCORI will publish documents produced under the "Environmental Scans, Literature Reviews & Topic Briefs" domain without authorship. In short, these will be published under the PCORI brand with appropriate acknowledgment to the drafters.

**Q113: Are there any policies regarding PCORI study investigators participating in contracts unrelated to their projects?**

A113: PCORI may allow study investigators to participate in contracts unrelated to their projects. However, PCORI expects such investigators to recuse themselves when conflicts arise and may, as cases may warrant, require an investigator to recuse themselves from activities which may advantage them in future competitions.

**Q114: Are we to determine Key Personnel for the IDIQ, such as an overall Program Manager, and separate Key Personnel for each of the four task orders? Will PCORI provide a list of desired Key Personnel to offerors?**

A114: There is no list of desired Key Personnel. PCORI expects the Offeror to propose a reasonable list of staff in roles that they believe would be appropriate to complete the task effectively and efficiently.

**Q115: Is the four page Past Performance Questionnaire included the Past Performance section's 10 page limit?**

A115: No. The four-page Past Performance section refers to the Offeror's submission of a description of relevant prior experience. The Past Performance Questionnaires should be completed by at least 3, but no more than 5, prior employers.

**Q116: Does the 35 page limit include responses to each task order, or is the limit just for the IDIQ portion of the submission?**

A116: Please reference the response to Q7 for information on this question.

**Q117: Is the offeror expected to provide a separate project management plan for the management of the IDIQ, and for each task order?**

A117: Yes.

**Q118: Are we to provide separate past performance citations for each task order? If so, what are the page limitations?**

A118: No, Offerors must include at least 3, and at most 5 past performance review forms total (see Appendix A) to be eligible for IDIQ inclusion.

Offerors may not include past performance reviews from PCORI, or use PCORI staff as references on past performance, although prior work completed for PCORI should be included as a note in past experience where applicable.

**Q119: Is there a set of anticipated labor categories for the IDIQ that we need to provide prices for? If not, are we limited to the labor categories we propose for the four task orders for the duration of the IDIQ, or are we providing costs as task orders come out under the IDIQ?**

A119: PCORI asks that Offerors provide the expected level of effort that they and any additional staff members will commit to the project(s) in their Volume 3: Price Proposal. PCORI does not have specific expectations regarding the level of effort proposed by an Offeror.

PCORI requests for the purposes of the IDIQ that Offerors will provide a reasonable and justified pricing band or range for each domain. Labor rates, indirect costs, etc., are acceptable for

justification. The goal of the IDIQ Price Proposal is to provide a good faith estimate of the range of project costs the Offeror can compete and complete successfully.

Price Proposals will be requested as a part of all tasks issued under the IDIQ.

**Q120: Are there projected travel locations already identified for the IDIQ so we can provide more accurate pricing?**

A120: There are no projected travel locations identified at this point.

**Q121: Does PCORI anticipate receiving five (5) separate price volumes in the submission (1 for the IDIQ and 1 each for the task orders)? Does the 4 page limit apply to each task order pricing or for the IDIQ plus the 4 task orders?**

A121: Please reference the response to Q32 for information on this question.

**Q122: In evaluating the offeror's response, will equal weight be given to each task order and the IDIQ response, or will the task orders with the longer periods of performance (TO 3 and 4) have greater weight?**

A122: Offerors will first be evaluated on the IDIQ level. Once deemed qualified under specific domains, they will be evaluated for any task orders they have applied for under that domain(s). Task orders are not given different weights in terms of an Offeror's eligibility to compete.

**Q123: Will PCORI evaluate submitted proposals as a whole (IDIQ and task order responses) or will they be evaluated separately? Is there greater consideration for a proposal with responses to all task orders as opposed to the minimum 2 task orders as stated in the RFP?**

A123: Please reference the response to Q95 for information on this question.

**Q124: Will PCORI use the same evaluation factors listed on page 14 and described on page 15 to evaluate responses to the task orders?**

A124: Yes.

**Q125: Is there a minimum number of past performance references required to be submitted for the IDIQ? Does the same minimum apply to each task order response?**

A125: Offerors must include at least 3, and at most 5 past performance review forms total (see Appendix A) to be eligible for IDIQ inclusion.

Offerors may not include past performance reviews from PCORI, or use PCORI staff as references on past performance, although prior work completed for PCORI should be included as a note in past experience where applicable.

**Q126: While the RFP remains silent on Indirect rates, the PCORI website states that Indirect rates for cost proposals to PCORI are capped at no more than 40%. Does this PCORI rate ceiling apply to any potential bidders when constructing their loaded labor rates for this award? Would this also apply to any subcontractors that may be used under a particular Task Order award?**

A126: No, in response to both questions. However, PCORI encourages Offerors to submit their maximally efficient cost proposals.

**Q127: From our research it appears that PCORI is not an authorized buyer off of the GSA schedules. The language on pg. 23 states that offerors are encouraged to use pricing competitive with**

**their GSA rates. Can potential bidders use their GSA schedule rates as the basis for their cost proposal?**

A127: Yes.

**Q128: Page 16 of the RFP requires the offeror to submit functional responsibilities and labor qualifications for each labor category. Our proposed labor descriptions exceed the price proposal page limit of four pages. Could we provide these descriptions in an appendix to the price proposal?**

A128: PCORI requests for the purposes of the IDIQ that Offerors will provide a reasonable and justified pricing band or range for each domain. Labor rates, indirect costs, etc., are acceptable for justification. The goal of the IDIQ Price Proposal is to provide a good faith estimate of the range of project costs the Offeror can compete and complete successfully. We believe that four (4) pages should be sufficient to provide this information and ask that you do not include additional information as an appendix.

**Q129: Page 23 of the RFP notes that offerors will detail labor categories, labor rates, and travel costs. As there are no travel costs associated with the IDIQ, can PCORI confirm that the references to travel and other direct costs are only associated with Task Orders and are not a requirement of the IDIQ pricing proposal?**

A129: Yes, confirmed.

**Q130: We understand that offerors are required to include at least 3, and at most 5 past performance questionnaires (Appendix A) for the IDIQ. Could you please clarify if offerors are required to submit additional past performance questionnaires for each task order?**

A130: No additional Past Performance Questionnaires should be submitted.

**Q131: Are proposers required to propose all 5 domains (Science of Engagement, Economic modeling, etc) included with the IDIQ RFP or a minimum of 2 domains?**

A131: Please reference the response to Q40 for information on this question.

**Q132: As noted by PCORI, a subcontractor performing greater than 20% of the work should provide past performance questionnaires. Please specify how many should be completed for each subcontractor to be deemed compliant with proposal requirements.**

A132: A subcontractor performing between 20-35% of the work should provide 1 past performance questionnaire, between 36-50% should provide 2 past performance questionnaires, and between 51-75% of the work should provide 3 past performance questionnaires.

**Q133: Are subcontractor past performance questionnaires to be duplicated for every Task Order which the sub will assist, or is once suffice?**

A133: Offerors must include at least 3, and at most 5 past performance review forms total (see Appendix A) to be eligible for IDIQ inclusion.

**Q134: Is there a file size limit proposers should be aware for the electronic proposal submission to PCORI?**

A134: No.



**Q135: For the Task order Proposals, are there still 3 volumes required (Admin, Technical and Pricing) or are only technical and pricing required?**

A135: Yes, three volumes are required. Page limits listed on page 23 of the RFP document reflect expectations for an IDIQ bid. Please refer to the answer to Q7 for information regarding task order page limits.

**Q136: Are attachments/exhibits included in the page number limits?**

A136: Yes.

**Q137: May the project plan and organizational charts be placed in an appendix or attachment and simply referenced in Volume II?**

A137: No, we ask that all information be included in the volumes themselves.

**Q138: The Offeror shall submit functional responsibilities and labor qualifications for each labor category under this RFP. Are these labor roles specified somewhere?**

A138: They are not. PCORI requests for the purposes of the IDIQ that Offerors will provide a reasonable and justified pricing band or range for each domain. Labor rates, indirect costs, etc., are acceptable for justification. The goal of the IDIQ Price Proposal is to provide a good faith estimate of the range of project costs the Offeror can compete and complete successfully.

**Q139: Is the intent of this section to address the specific capabilities outlined in the IDIQ contract, the elements associated with the four proposed TOs, or both?**

A139: Please reference the response to Q7 for more information on this question.

**Q140: How should the elements of the technical proposal address the specific task orders? By deliverable or general scope of work? (This is important to delineate in limited page allowance.)**

**Is there a cost estimate or cost ceiling associated with the TO or associated task orders?**

A140: Within the page limitations referenced in the response to Q7, we expect Offerors to address both the general scope of work and deliverables as appropriate. There is no cost estimate or ceiling associated with the IDIQ or associated TOs.

**Q141: What is the reimbursement type for the four TOs included in the IDIQ RFP?**

A141: Please reference the response to Q36 for more information on this question.

**Q142: Are these costs to be only those associated with administrative, technical and operational expertise needed to independently operate the elements of the IDIQ award and deliverables or should it also include cost breakdowns for each of the TOs specified in the IDIQ?**

A142: PCORI requests for the purposes of the IDIQ that Offerors will provide a reasonable and justified pricing band or range for each domain. Labor rates, indirect costs, etc., are acceptable for justification. The goal of the IDIQ Price Proposal is to provide a good faith estimate of the range of project costs the Offeror can compete and complete successfully. Price Proposals for individual TOs should include cost breakdowns for that particular TO.

**Q143: Should there be a separate Volume 3: Price Proposal for each of the 4 Task Orders or, should there only be 1 Volume 3: Price Proposal for all 4 of the Task Orders?**

A143: Separate for each.

**Q144: Does PCORI have a sample, preferred format for submission of Volume 3: Price Proposal information? If so, where can that be found?**

A144: PCORI does not share samples of Price Proposals. However, there is no required, standard format for them, so you may submit whatever format you have.

**Q145: In the Price Proposal instructions, there is a requirement that, “The Offeror shall submit functional responsibilities and labor qualifications for each labor category under this RFP.”. Since a written narrative of this nature might consume a lot of the 4-page limitation on the size of Price Proposals then is this information supposed to be presented in the Volume I: Administrative (no page limit) instead of the Price Proposal volume?**

A145: PCORI requests for the purposes of the IDIQ that Offerors will provide a reasonable and justified pricing band or range for each domain. Labor rates, indirect costs, etc., are acceptable for justification. The goal of the IDIQ Price Proposal is to provide a good faith estimate of the range of project costs the Offeror can compete and complete successfully. We believe that four (4) pages should be sufficient to provide this information for this. Please note that Price Proposals for individual TOs should include cost breakdowns for that particular TO, and you are not expected to include that in the four pages.

**Q146: On page 74 of the RFP instructions there is this sentence, “The Offeror shall utilize the table below to include the appropriate labor categories, material, travel, Other Direct Costs (ODC) and fully-burdened, fixed hourly labor rates in proposing their price to accomplish the deliverables necessary and incidental to performing the statement of work in Appendix B.”. However, there is no table located in that section. Will a table format be provided?**

A146: A table will not be provided, but any table format that you develop will be accepted.

**Q147: Are the IDIQ proposal and each Task Order bid the respondent wishes to pursue all due on July 14th?**

A147: Yes.

**Q148: Are the IDIQ proposal and each individual Task Order bid the respondent wishes to pursue to be submitted all as one zip file, or should each be submitted in separate electronic communication?**

A148: All submissions in one would be preferable, but we will accept separate if necessary.

**Q149: If a consortia bid is proposed, can the role of prime and sub-contractor in each Task Order vary depending on the nature of the work?**

A149: Yes. Although, for subcontractors contributing more than 20% effort on a task order, please reference the response to Q132 for details on Past Performance Review submission requirements.

**Q150: If a consortia bid is proposed, are the details associated with roles expected to be delineated for each TO and the IDIQ, or is PCORI seeking to have the breakdown of the general operational expertise to be outlined for each proposed organization, and linked to the four major elements of the IDIQ?**

A150: If a consortia bid is proposed, PCORI expects the IDIQ application to break down the general operational expertise or contribution anticipated from each party under each domain in the IDIQ for which the applicant seeks qualification.

Consortia should further delineate and define the roles and responsibilities of each party to the consortia in individual task order applications.

**Q151: Can PCORI provide a list of who they believe to be eligible entities to perform this work?**

A151: Eligible entities to perform this work include those who submit high-quality applications, have the appropriate experience, and are allowable under the “Eligibility” list [found here](#).

**Q152: If any, what are the Government Accounting & time/materials management systems requirements of the prime contractor?**

A152: None. PCORI is not a government entity, thus we have no such requirements.

**Q153: If we put in a proposal for this work, who exactly do we work for? Would PCORI match us with projects who need this kind of consulting work? Or is PCORI the client and we would work with your staff when PCORI is running a meeting with patient stakeholders?**

A153: All work proposed in task orders issued by PCORI will be directly for PCORI.

**Q154: Do you want applicants to develop toolkits that all PCORI grantees can use/adapt or do you want applicants to be available to consult with PCORI grantees to develop/tailor materials for that specific project?**

A154: PCORI is looking for Offerors to respond to at least two of the IDIQ domains and corresponding task orders as appropriate for the organization’s expertise. If any task order calls for the development of a toolkit, information will be issued within the task order details. As it stands, PCORI is not seeking toolkit development from an Offeror at this point.

**Q155: There is no "Task Order" section to describe what kind of work/proposal PCORI wants applicants to do for "Meeting Support and Facilitation". Can you please provide more specific detail re: what you are looking for?**

A155: An Offeror may apply for the Meeting Support and Facilitation domain under the IDIQ at this point with the expectation that task orders will be issued under it in the future for IDIQ awardees to compete for. For that reason, there are no specific details available outside of what has been outlined in the IDIQ domain section.

Please refer to Q1 for more information regarding how to demonstrate qualification for a domain on the IDIQ level.

**Q156: We have developed a variety of orientation programs for stakeholders and are eager to update and create new/improved modules for this toolkit, but how does this existing resource fit with what PCORI is looking for in this RFP? In our experience, research teams find online toolkits useful, but really benefit from consulting support to help tailor and implement them effectively for their specific project. Does this kind of consulting work fit within the scope of the current RFP? If so, how does it fit?**

A156: Any toolkits and materials developed, and/or consulting experience will be taken into consideration under past performance, and reviewed as qualification to complete related

proposed work. However, as stated in Q154, PCORI is not commissioning the use/expansion of existing toolkits or consulting services for projects through this IDIQ.