



Clinical Trial Simulation

REQUEST FOR PROPOSAL

RFP # PCO-DMTRIAL2016

October 31, 2016

KEY DATES	
Request for Proposal Released	October 31, 2016
Deadline for Questions	November 15, 2016
Deadline for Proposals	November 30, 2016
Projected Award Date	December 20, 2016
Projected Start Date	January 16, 2016



About PCORI

PCORI was authorized by the Patient Protection and Affordable Care Act of 2010 as a non-profit, nongovernmental organization and is charged with helping patients, clinicians, purchasers, and policy makers make better-informed health decisions by “advancing the quality and relevance of evidence about how to prevent, diagnose, treat, monitor, and manage diseases, disorders, and other health conditions.” It does this by funding research guided by patients, caregivers, and the broader healthcare community, which results in high-integrity, evidence-based information.

One of PCORI’s strategic goals is to influence clinical and healthcare research funded by others to be more patient centered. PCORI aims to demonstrate that a patient-centered, stakeholder-driven approach to clinical research has value to other funders of healthcare research by improving the quality, relevance, and usability of study findings. PCORI’s ability to achieve this goal depends, in part, on having scientific and non-scientific (i.e., lay) persons who are well-trained in patient-centered outcomes research (PCOR).

PCORI’s strong patient-centered orientation directs attention to individual and system differences that may influence research strategies and outcomes. PCORI is charged with producing useful, relevant clinical evidence through the funding of new research and the analysis and synthesis of existing research.

PCORI is committed to transparency and a rigorous stakeholder-driven process that emphasizes patient engagement. PCORI uses a variety of forums and public comment periods to obtain public input to enhance its work.

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Follow us on Twitter: [@PCORI](https://twitter.com/PCORI)



Opportunity Snapshot

PCORI is seeking to commission the conduct of a clinical trial simulation project modeling different aspects of the trial design, implementation, and analysis of the trial data for a clinical trial comparing second-line treatments used as add-ons to metformin in the treatment of type 2 diabetes mellitus (DM) when glycemic control cannot be maintained with metformin alone. The goal is to help inform PCORI in critically assessing how various assumptions used in the planning of such a trial could affect the decisions on the design requirements (e.g., fixed/adaptive, comparators, inclusion/exclusion, power and sample size, events and outcomes measures, duration, etc.) as well as the execution of the trial, and ultimately the most efficient and expedient path to develop comparative effectiveness evidence for second-line DM treatment.

Proposals should be received no later than 5 pm (ET) on November 30, 2016. Prospective applicants may submit questions regarding the RFP no later than 5 pm (ET) on November 15, 2016.

This will be a **single** award. The Contractor will operate at the direction of and receive guidance from PCORI.

How to Proceed



1. Review the Requirements

Examine all sections of the RFP and learn about [what makes PCORI's research different](#).¹

2. Consider the Evaluation Criteria

Consider the organization eligibility requirements and PCORI's specific requirements to see whether your organization, your interests, and your capabilities fit the requirements listed in this RFP. Check the PCORI website for any modifications or amendments up to the submission deadline.

3. Develop Your Proposal

Develop your response to the requirements within this RFP.

4. Follow Submission Guidelines

See the [Submission Guidelines](#) section of this document.

5. Submit Your Proposal

Proposals are due by 5 pm (ET) on November 30, 2016.

¹ Available at pcori.org/research-we-support/pcor



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Statement of Work

Through this Request for Proposal (RFP), PCORI announces its intention to contract for the clinical trial simulation. PCORI envisions that, through this RFP, it will contract with a **single Contractor**.

Purpose

PCORI is seeking proposals from organizations capable of undertaking a trial simulation project detailing their proposed work plan to model various parameters of the proposed potential clinical trial.

Scope

The Contractor selected will:

- review and/or update an existing literature review on the efficacy and effectiveness of the three drugs to be compared, including both clinical trials and meta-analyses, in order to develop a set of assumptions to be built into the modeling (e.g., progression of CVD, treatment causal effects, and trial design/execution);
- based on best evidence from the literature, develop a set of assumptions and associated ranges to be modeled including event rates, lost to follow-up, duration of enrollment period, follow-up duration, and risk reduction;
- develop sample size estimates based on specific sets of assumptions as defined above and through an iterative process with PCORI for both fixed and adaptive design as well as non-inferiority and superiority designs;
- model adaptive design choices including the implications of dropping or adding a study arm mid-study, based on unanticipated findings about one of the medications or the entry of a new medication that should be considered in the trial;
- identify and include other relevant parameters, as warranted, in the modeling exercise;
- develop sample size estimates based on subpopulations that are documented to experience higher and lower event rates and better or worse responses to therapy;
- hold a kickoff call and check-in calls with PCORI, as needed, during project period; and
- provide additional modeling support, as changes in the evidence base necessitate and/or if applicable, as the proposed clinical trial planning commenced, over the duration of the one-year project period.



Additional Requirements/Tasks

The Contractor must perform the following tasks:

- The Contractor shall describe the overall plan for organizing, staffing, and managing the tasks required by the Statement of Work (SOW). The plan shall indicate how roles and responsibilities will be divided, decisions made, work monitored, and quality and timeliness assured.
- The Contractor shall submit résumés for all personnel on the Project Team and provide a statement of level of effort (LOE) for each of these key personnel.

PCORI encourages the Offerors to reflect an understanding of the attributes mentioned above in their proposals. PCORI will assess the performance of Contractors according to the criteria established in this RFP.

Deliverables

All deliverables must be completed and provided to PCORI, including, but not limited to, those listed in the following deliverable schedule.

Deliverables	Due Date
Kickoff call with PCORI.	January 20, 2017
Work plan detailing items identified in SOW submitted to PCORI.	January 30, 2017
Summary of literature to be used in developing model assumptions submitted to PCORI.	February 13, 2017
Draft report including tables that summarize the findings of each scenario and a brief narrative description of each scenario and the assumptions included therein submitted to PCORI for discussion and revision.	March 27, 2017
Meeting with PCORI to discuss draft report and initial modeling outputs.	April 10, 2017
Revisions to the model made. Revised report submitted to PCORI.	April 24, 2017
Conference call with PCORI to discuss potential additional modeling needs.	June 2017
Conference call with PCORI to discuss potential additional modeling needs.	September 2017
Additional conference calls, as needed.	As needed
Additional scenarios modeled, as needed, during one-year project period.	Final deliverable January 15, 2018

Acceptance of Deliverables

PCORI will review and provide comments on each deliverable within five (5) business days of receipt of the deliverable or within such other reasonable time frame as agreed upon by the Contractor and PCORI, given the nature of the deliverable being reviewed by PCORI. PCORI and/or the Project Lead shall provide the Contractor with written acceptance or rejection (with specified reasons). The Contractor will have five (5) business days to complete and deliver changes made as a response to PCORI's (and/or the Project Lead's) comments. The Contractor shall be allowed one re-submission of the deliverable. If the re-submission is rejected, the assigned Project Lead, PCORI's Procurement Office, and the Contractor's representative will arbitrate a resolution. If PCORI or the assigned PCORI Project Officer does not meet its deadline or provide notice of an extension request, it is the Contractor's responsibility to contact the PCORI Project Officer to inquire about the submitted deliverable.

Kickoff Meeting

The Contractor shall work with PCORI to schedule and coordinate a Project Kickoff Meeting at the PCORI office or via a conference call. The meeting will provide an introduction between the Contractor personnel and PCORI personnel who will be involved with the agreement. The meeting will provide the opportunity to discuss technical, management, and reporting procedures. At a minimum, the attendees shall include key Contractor personnel, and PCORI's Procurement Department and Project Lead (PL). The Contractor shall provide the following at the kickoff meeting:

- Introduction of personnel
- Overview of project tasks
- Schedule
- Invoice procedures
- Reporting requirements, e.g., Monthly Status Report (MSR)
- Points of contact (POC)
- Roles and responsibilities
- Prioritization of Contractor activities
- Quality surveillance
- Any initial deliverables
- Additional issues of concern.

PCORI will coordinate a separate kickoff meeting with the Contractor to discuss the roles and responsibilities of the PL Project Lead's Authority



Performance of work under this contract must be subject to the technical direction of the Project Leader or a representative designated in writing. The term “technical direction” includes, without limitation, direction to the Contractor that directs or redirects the labor effort, shifts the work between work areas or locations, fills in details, and otherwise serves to ensure that tasks outlined in the work statement are accomplished satisfactorily.

- (a) Technical direction must be within the scope of the specification(s)/work statement.
- (b) Technical direction may be oral or in writing.

The Project Lead does not have authority to issue technical direction that:

- (a) constitutes a change of assignment or additional work outside the specification(s)/statement of work;
- (b) in any manner causes an increase or decrease in the contract price, or the time required for contract performance;
- (c) changes any of the terms, conditions, or specification(s)/work statement of the agreement; or
- (d) interferes with the Contractor's right to perform under the terms and conditions of the agreement.

Period of Performance

The period of performance for the agreement will be twelve (12) months. The projected award date is **December 20, 2016**.

Type of Agreement

PCORI expects to award **one (1)** Contractor for a **firm fixed price** agreement. This agreement type provides an estimate of the work required to be performed over the agreement period. The actual quantities of services ordered under this agreement may be significantly less or possibly more than the quantity. Contractors must be able to perform all activities described in the SOW. PCORI encourages the use of Contract teaming arrangements and/or subcontractors to ensure that project teams have the necessary expertise to accomplish the work.

Proposal Evaluation Criteria

The Basis of Award will be Best Value. A **firm fixed price** agreement will be awarded to the Offeror whose quote, conforming to the RFP, represents the best value to PCORI. When determining Best Value, Technical and Past Performance, when combined, are significantly more important than cost or price. Proposals that are unrealistic in terms of technical or schedule commitments, or unrealistically high or low in terms of price/cost, may be deemed to be reflective of an inherent lack of technical competence, or indicative of a failure to comprehend the complexity and risks of the proposed work, and may be grounds for rejection of the proposal. Cost/price is not the most important evaluation factor, but its degree of importance will increase commensurably with the degree of equality among different Offerors' Technical and Past Performance proposals.

PCORI will award no more than **one (1)** agreement as a result of this Request for Proposal.

PCORI will award the **firm fixed price** resulting from this Request for Proposal to the responsible Offeror whose offer conforming to the RFP will be most advantageous to PCORI. An evaluation of the Offerors' price proposals will be made to determine if they are realistic for the work to be performed, reflect a clear understanding of the requirements, and are consistent with various elements of the technical proposal. PCORI will evaluate the reasonableness of the price of each compliant offer in relation to the Offeror's relative quality. Reasonableness will be determined considering other competitive prices received and comparison to the Independent Cost Estimate (ICE).

Whether a price is too high or too low may be considered in the context of comparison to other price proposals as well as to the ICE, or to any other information the Procurement Office deems useful in their discretion. The price reasonableness evaluation will result in a determination of a fair and reasonable price to PCORI.

Proposals will be evaluated using the following criteria:

Category	Weight of Rating Factor
Technical Approach	40%
Project Management Plan	30%
Past Performance	30%

An award will be made to the Contractor who proposes the best value, with the technical approach being the most important factor. PCORI will consider the evaluation factors indicated below.

Technical Approach

Submit a narrative that addresses the Offeror's ability to demonstrate that they have a technical understanding of the requirements and the overall capability and experience in providing the

requirements specific to meet the needs of PCORI. Offerors must provide a detailed plan that includes a description of the proposed approach and a detailed draft project plan outlining the requirements in the Statement of Work. Describe what events/activities are envisioned, what contacts and resources are proposed to accomplish the tasks, and demonstrate how the proposed approach will accomplish the objectives specified.

Project Management Plan

The Offeror shall propose a comprehensive Project Management Plan. The plan must give PCORI a high degree of confidence that the Offeror has a robust plan for conducting the tasks and submitting high-quality deliverables; it should feature clear, actionable strategies and timeframes for accomplishing the requirements and objectives. The Project Management Plan must be fully integrated with the Statement of Work and requirements within this RFP; it shall address the Offeror's overall capability to manage the work required.

Please include an organization chart, with named personnel, that demonstrates reporting lines and areas of responsibility. Personnel proposed must demonstrate core expertise in the tasks anticipated. Provide résumés in an appendix for the named key personnel to demonstrate their experience in comparable positions on prior projects/contracts that are similar and relevant to the scope and complexity contemplated. *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 organizational 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, overcome or mitigate constraints, and meet or exceed contract performance requirements.

Past Performance

The Offeror is expected to demonstrate their previous experience in providing the requirements outlined in this RFP. PCORI's intent is to determine whether the Offerors have performed services on contracts relevant in scope and complexity with the requirements set forth in the Request for Proposal and whether the Offerors consistently deliver quality services in a timely manner. This factor will be evaluated on the basis of the Offerors' relevant similar experience during the past three (3) years. The information presented in the Offerors' proposals, together with information from any other sources available to PCORI, will be used in the evaluation of past performance.

All past performance must be for projects which are ongoing or completed within the last three years, and all for projects of a similar size, scope, or complexity as the requirements under this agreement. The questionnaires shall be completed by the references and submitted directly to the RFP Mailbox – RFP@pcori.org:



Please submit three past performance references from the projects identified and provide the following:

- Agreement/Contract Name
- Agreement/Contract Description (e.g., identify commodity/service, acquisition methodologies, dollar value of acquisitions supported, type of contract actions, number of resources supporting, performance challenges encountered, and corrective actions taken, etc.).
- Dollar Amount of Contract
- Duration (including Start Date, Completion date, both targeted and actual)
- Point of Contact, Telephone Number, and Current E-Mail.

Price Proposal

Prices will be proposed based on established catalog or commercial market prices. Offerors who are General Services Administration (GSA) Schedule holders are encouraged to offer pricing that is competitive with their currently awarded Schedule rates.

Ceiling amounts will be established in the execution of Cost reimbursement and time and material agreements.

A determination shall be made as to the reasonableness and the completeness of the price proposals. PCORI shall use their price analysis to determine whether the proposed prices are fair and reasonable. Price will not receive an adjectival rating.

The Offeror shall submit functional responsibilities and labor qualifications for each labor category under this RFP. Functional responsibilities shall include the principal duties to be performed by the labor category. Labor qualifications shall include experience and/or education requirements for all labor categories. In addition, the Offeror shall provide a narrative outlining the rationale for the functional responsibilities and qualifications proposed for each category. The proposed labor qualifications will be incorporated into the resulting contract, thereby becoming the standards for use during performance of the effort.

PCORI will assign the following color coding system to evaluate the non-price factors:

Purple	Exceeds evaluation standards in a beneficial way; has a high probability of satisfying the requirement and has no significant weakness.
Blue	Meets and sometimes exceeds the evaluation standards and demonstrates a good understanding and ability to meet PCORI's requirements. There is little risk to PCORI and the Offeror demonstrates one or more strengths that will benefit PCORI.
Green	Meets evaluation standards and will satisfy the minimum requirements. Weaknesses are minor and can be readily corrected.
Yellow	Fails to meet one or more evaluation standards. There is low probability of satisfying the requirements and the Offeror demonstrates one or more significant weaknesses or has numerous weaknesses.
Red	Fails to meet minimum requirements and noted deficiencies require major revisions to the proposal in order to make the proposal acceptable.

Award without Communications or Clarifications

PCORI reserves the right to award without communications or clarifications, so it is in the best interest of each Offeror to include their most favorable terms in their initial submission. However, PCORI reserves the right to conduct communications or clarifications.

Best and Final Offers

Subsequent to receiving the original proposals, PCORI reserves the right to notify all technically acceptable Contractors within the competitive range and to provide them an opportunity to submit written best and final offers (BAFOs) for the agreement at the designated date and time. BAFOs shall be subject to the late submissions, late modifications, and late withdrawals of proposals provision of this RFP. After receipt of a BAFO, no discussions shall be reopened unless PCORI determines that it is clearly in PCORI's best interest to do so (e.g., it is clear that information available at that time is inadequate to reasonably justify Contractor selection and award based on the BAFOs received). If discussions are reopened, PCORI shall issue an additional request for BAFOs to all technically acceptable Contractors still within the competitive range.

Withdrawal or Modification of Proposals

An Offeror may modify or withdraw its proposal upon written, electronic, or facsimile notice if received at the location designated in the solicitation for submission of proposals not later than the closing date and time for receipt of proposals.



Late Submissions

Late proposals, requests for modification, or requests for withdrawal shall not be considered, unless a late modification of a successful proposal makes terms more favorable for PCORI.

Retention of Proposals

All proposal documents shall be the property of PCORI, retained by PCORI, and not returned to the Offerors.

Documentation Requirements

The Contractor may be required to provide documentation to support its legal ability to operate facilities in the United States.

Basis of Compensation to the Contractor

PCORI expects to award a contract for the technical and cost proposal that is proposed, negotiated with PCORI during the Best and Final Offer process, and listed in the agreement executed between the organizations. Any Contractor quality issues that result in the re-drafting of work or increased labor required to meet deliverables during the performance of the contract are the financial responsibility of the Contractor, and re-work will be done at the Contractor's expense.

Post-Award Debriefing

PCORI's Procurement Department will provide a timely notification to all unsuccessful Offerors once an award has been made. All unsuccessful Offerors may request a post-award debriefing by providing a written request to RFP@pcori.org within three (3) business days after receiving the award notification. If a debriefing is given to the requesting Offerors, PCORI will work with the unsuccessful Offeror to schedule a reasonable date and time. PCORI will provide verbal or written debriefs.



Post-Award Information

PCORI Rights

PCORI will own all documents and materials produced under this agreement.

Furnishing of Equipment/Property

The Contractor shall furnish its own office, equipment, personnel, and technology.

Place of Performance

The Contractor is required to provide the facilities necessary to execute the Contract. The Contractor shall choose its staff or acquire the necessary personnel support and provide suitable work facilities.

Hours of Service

The Contractor shall be available Monday through Friday, between 9 am and 5 pm ET. PCORI has regular observance of federal holidays: New Year's Day; Birthday of Martin Luther King, Jr.; Washington's Birthday; Memorial Day; Independence Day; Labor Day; Veterans Day; Thanksgiving Day; and Christmas Day.

Insurance

The Contractor, at its own expense, shall provide and maintain the general liability insurance in support of this contract for the entire duration, including option years, with \$1 million minimum coverage. The Contractor assumes absolute responsibility and liability for any and all personal injuries or death and/or property damage or losses suffered due to negligence of the Contractor's personnel in the performance of the services required under this contract.

Non-Disclosure Requirements

The Contractor, including all of its personnel (to include employees, replacement personnel, subcontractors, teaming partners, and consultants), shall not use or release any sensitive, confidential, or proprietary information without prior written approval from PCORI. The Contractor shall put in place appropriate procedures for the protection of such information and shall be liable to PCORI for any misuse or unauthorized disclosure of such information by its personnel.

Potential for Organizational Conflict of Interest and Personal Conflicts of Interest (COI)

The term “organizational conflict of interest” means that the Contractor (which term hereinafter shall be deemed to include its chief executives, directors, any employees, or subcontractors utilized under the agreement other than a Contractor selling incidental material) has interests in which:

- (i) may diminish its capacity to give impartial, technically sound, objective assistance and advise in performing this tasks;
- (ii) may otherwise result in a biased work product under this task; or
- (iii) may result in an unfair competitive advantage to itself or others.

The Contractor, including its subcontractor personnel performing work under this agreement, may receive, have access to, or participate in the development of proprietary information (e.g., cost or pricing information, budget information or analyses, specifications or work statements, etc.) which may create a current or subsequent Organizational Conflicts of Interest (OCI). The Contractor shall notify the Procurement Office immediately whenever it becomes aware that such access or participation may result in any actual or potential OCI and shall promptly submit a plan to the Procurement Office to avoid or mitigate any such OCI. The Contractor’s mitigation plan will be determined to be acceptable solely at the discretion of the Procurement Office and in the event that the Procurement Office unilaterally determines that any such OCI cannot be satisfactorily avoided or mitigated, the Procurement Office may affect other remedies as he or she deems necessary, including prohibiting the Contractor from participation in subsequent contracted requirements which may be affected by the OCI.

The Contractor, upon award, shall sign a statement confirming that it does not have and will prevent any organizational conflict of interest.

Compliance

The Contractor must comply with PCORI’s rules and regulations, all required forms, and any changes in procedures. The Contractor will remain informed of any such changes and updates, as necessary, by the PCORI Procurement Office. Upon the request of employees or other persons with disabilities participating in official business, the Contractor must arrange necessary and reasonable accommodations for the impaired individual(s) per Section 508 Compliance.

Invoice Content

The Contractor shall invoice on a monthly basis. The invoice shall include the period of performance covered by the invoice and the level of effort for each task performed. All hours and costs shall be reported by division, task, and by labor category, and shall be provided for the current billing month and in total from project inception to date. If teaming or subcontracting is proposed, one consolidated invoice from the prime Contractor shall be submitted in accordance with other terms and conditions of



the Contract. The invoice must be signed by an individual authorized by the Contractor. The Contractor shall provide the invoice data in spreadsheet form with the following detailed information (the listing shall include separate columns and totals for the current invoice period and the project to date, identified by division and task):

- Contractor's name
- Contractor's address
- Purpose of the invoice
- Date that the invoice was submitted
- Contractor labor category
- Labor rate
- Details of the goods or services provided (for goods, please indicate the quantity) or description of the deliverable
- Travel expenses (if applicable and will need to be provided with receipts)
- Other direct costs (if applicable and will need to be provided with receipts)
- Monthly and total cumulative hours worked
- Total value of the invoice.

The Contractor must submit the Final invoice within 30 days after the completion of the agreement. The final invoice must be marked "FINAL" and shall be submitted to PCORI. The Contractor agrees and understands that an incomplete invoice will be rejected and returned without payment.

Billing and Payment Procedures

PCORI prefers electronic invoicing. Invoices shall be provided to the Finance Department on a monthly basis.

Billing address:

PCORI
Attn: Finance Department
1828 L St., NW, Suite 900
Washington, DC 20036
E-mail: finance@pcori.org

Submission Guidelines

Submissions should be organized in three (3) separate volumes – i.e., one volume for the Administrative, one volume for the Technical Solution (Technical Approach, Project Management Plan, and Past Performance), and one volume for the Price proposal – sent as separate files. All text should be Arial or Times New Roman font, no less than 11 point, with one-inch margins and single-spaced. Graphics and tables may be included. We accept MS Word, MS Excel, and Adobe PDF formats.

The Offeror is advised that its offer, if accepted by PCORI, will form a binding agreement. Therefore, care must be taken to properly address the requirements set forth in the RFP. These instructions set forth requirements for preparation and submission of proposals and to establish format and specific content of each offer. This is to assure completeness and suitability for both evaluation purposes and the cohesiveness of the resulting agreement. Be sure that the proposal explains how your firm will fully satisfy all of the performance requirements of the intended agreement. Submit a complete proposal. Proposals that are not complete may be determined unresponsive and rejected.

Proposals should be sent electronically to RFP@pcori.org. Proposals not received by the time stated above will not be considered.

Questions must be submitted to RFP@pcori.org, referencing **RFP # PCO-DMTRIAL1016** in the Subject line: Clinical Trial Simulation, **no later than 5:00 pm (ET) on November 15, 2016**.

Offerors shall submit proposals in response to this solicitation electronically as follows:

Volume 1: Administrative – Page Limit: None

Each submission must include a cover letter with following information:

- Offeror's name and mailing address
- Reference to the solicitation (RFP) number (PCO-DMTRIAL1016)
- Technical and contract points of contact (name, phone number, and e-mail address)
- Business size (large, small, state/federal certifications—MBE, 8(a), HUBZone, etc.)
- Dunn & Bradstreet Number (DUNS)
- Federal Tax ID (EIN, TIN, SS)
- Affirmation that the proposal is valid for at least 30 days
- 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
- Acknowledgement of any amendments by reference.

Volume 2: Technical Solution – Page Limit: 20

1. Technical Approach – **Page Limit: 12**
2. Project Management Plan – **Page Limit: 4**
3. Past Performance – **Page Limit: 4**

Volume 3: Price Proposal – Page Limit: 4

The written Price proposal shall contain the following:

1. Offerors will demonstrate how they arrived at their proposed pricing by detailing labor categories, labor rates, and travel costs.
2. Proposed pricing must include estimated direct expenses including all subcontractor labor (if applicable), travel costs, and other direct expenses. Include burden as applicable, specifying burden rates and burden calculations.
3. Volume 3 shall be no more than four (4) pages with no smaller than 11-point font.

Appendix A: Past Performance Questionnaire

SECTION 1: CONTRACT IDENTIFICATION

- A. Contractor: _____
- B. Contract Number: _____
- C. Contract Type: _____
- D. Period of Performance: _____
- E. Current/Final contract cost: _____
- F. Description of services provided:

SECTION 2: CUSTOMER IDENTIFICATION

- A. Customer Name: _____
- B. Description of services under this contract, i.e., local, nationwide, worldwide: _____

SECTION 3: REFERENCE IDENTIFICATION

- A. Reference's name: _____
- B. Reference's title: _____
- C. Reference's phone/fax number: _____
- D. Reference's e-mail address: _____

SECTION 4: EVALUATION

The purpose of this evaluation is to understand your satisfaction with the Contractor in respect to the delivery of acquisition and administrative support services.

Please indicate your satisfaction with the Contractor's performance by placing an "X" in the appropriate block using the scale provided to the right of each question. This scale is defined as follows:

Excellent (E)	Performance meets contractual requirements and exceeds many (requirements) to the customer's benefit. The contractual performance of the element being assessed was accomplished with few minor problems for which corrective actions taken by the Contractor were highly effective.
Good (G)	Performance meets contractual requirements and exceeds some (requirements) to the customer's benefit. The contractual performance of the element being assessed was accomplished with some minor problems for which corrective actions taken by the Contractor were highly effective.
Acceptable (A)	Performance meets contractual requirements. The contractual performance of the element being assessed contains some minor problems for which corrective actions taken by the Contractor appear, or were, satisfactory.
Marginal (M)	Performance does not meet contractual requirements. The contractual performance of the element being assessed reflects a serious problem for which the Contractor has not yet identified corrective actions or the Contractor's proposed actions appear only marginally effective or were not fully implemented.
Unacceptable (U)	Performance does not meet most contractual requirements and recovery is not likely in a timely manner. The contractual performance of the element being assessed contains serious problem(s) for which the Contractor's corrective actions appear, or were, ineffective.
Not Applicable	Unable to provide a score.

Performance	E	G	A	M	U	NA
Acquisition Management Support Past Performance (as applicable):						
Technical adequacy/effectiveness of quality control programs and adherence to contract quality assurance requirements						
Effectiveness of overall contract management (including ability to effectively lead, manage, and control the program)						
Contractor was reasonable and cooperative in dealing with your staff (including the ability to successfully resolve disagreements/disputes)						
Timeliness/effectiveness of contract problem resolution without extensive customer guidance						
Understanding the customer objectives and technical requirements						
Contractor proposed alternative methods/processes that reduced cost, improved maintainability, or other factors that benefited the customer						
Contractor implemented responsive/flexible processes to improve quality and timeliness of support						
Ability to hire/apply a qualified workforce to this effort						
Ability to manage transition from prior contract/service provider						
Rate the firm's ability to deliver quality service in a timely manner						
Rate the firm's ability to meet contract requirements						
Rate the firm's adherence to contract schedules including administrative aspects of performance						
Were you satisfied with the company's performance?						
Would you use them again?						

Please discuss every response for which you indicated Excellent, Good, Marginal, or Unacceptable below:



NARRATIVE SUMMARY:

Reference's Signature

Date

THANK YOU FOR YOUR PROMPT RESPONSE AND ASSISTANCE! Please return this completed questionnaire no later than **Month Day, 20XX 2:00 pm Eastern Time** to: RFP@pcori.org,
Subject: **PCO-DMTRIAL1016** Past Performance.