Accredited Continuing Medical Education and Continuing Education for Clinicians

REQUEST FOR PROPOSAL

RFP # PCO-ACME&CEC2014

August 5, 2014

<table>
<thead>
<tr>
<th>KEY DATES</th>
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<tbody>
<tr>
<td>Request for Proposal Released</td>
<td>August 5, 2014</td>
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<tr>
<td>Deadline for Questions</td>
<td>August 18, 2014</td>
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<tr>
<td>Deadline for Proposals</td>
<td>August 29, 2014</td>
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<tr>
<td>Projected Award Date</td>
<td>September 19, 2014</td>
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<tr>
<td>Projected Start Date</td>
<td>September 19, 2014</td>
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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 producing and promoting high-integrity, evidence-based information that comes from research guided by patients, caregivers, and the broader healthcare community.

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 support 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.

Patient-Centered Outcomes Research Institute
1828 L St., NW, Suite 900
Washington, DC 20036
Phone: (202) 827-7700
Fax: (202) 355-9558
Email: info@pcori.org

Follow us on Twitter: @PCORI
Opportunity Snapshot

The Patient-Centered Outcomes Research Institute (PCORI) is seeking fully accredited providers to work with PCORI to develop and maintain Continuing Medical Education (CME) and Continuing Education (CE) units for clinicians. Such CME/CE units will be accredited and based upon PCORI training materials and content, patient-centered outcomes research, findings from PCORI-funded projects, or other subject matter provided and/or approved by PCORI. Development and maintenance of all activities must be consistent with applicable accrediting bodies.

The contractor will:

- Conduct a needs assessment of clinician communities and sub-communities identified by PCORI
- Design and develop live and online CME/CE activities based on PCORI content and approved by PCORI
- Promote CME/CE educational activities
- Implement and evaluate CME/CE activities
- Track and report on CME/CE activity completions and provide CME/CE certificates of completion

PCORI will own the work products developed under the agreement (e.g., content) and anticipates entering into appropriate licensing arrangements with the selected contractors to enable implementation of the agreement, consistent with PCORI’s non-profit status, mission, and authorizing law.

Proposals should be received no later than 5 p.m. (ET) on August 29, 2014. Prospective applicants may submit questions regarding the RFP no later than 5 p.m. (ET) on August 18, 2014.

PCORI expects to identify multiple contractors, each with a Master Services Agreement (MSA) and to release multiple Task Orders under each MSA. PCORI may decide to use selected contractors for any one or more services (i.e., PCORI may use each selected contractor for some, but not all, of the anticipated services). The period of performance for the MSA will be a three-year base period with two one-year option periods. The projected MSA award date is September 19, 2014.

Task Orders awarded through the MSA contract will be cost reimbursable. 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 this program. Check the PCORI website for any modifications or amendments up to the submission deadline.

3. **Develop Your Proposal**
   Develop your response to accomplish the Scope of Work.

4. **Follow Submission Guidelines**
   See the Submission Guidelines section of this document.

5. **Submit Your Proposal**
   Proposals are due by 5 p.m. (ET) on August 29, 2014.

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\(^{1}\) Available at pcori.org/research-we-support/pcor
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**Background**

The Patient-Centered Outcomes Research Institute (PCORI) was created to conduct research to provide information about the best available evidence to help patients, those who care for them, payers, policy makers, and others make better-informed decisions. PCORI’s research is intended to give patients and their caregivers a better understanding of the prevention, treatment, and care options available and the science that supports those options.

PCORI is interested in identifying one or more accredited CME/CE providers to partner with us in developing and providing accredited educational activities that reflect PCORI’s unique contributions to PCOR. Examples of our proposed content for CMEs/CEs include:

- Methodology standards for completing PCOR
- Patient and Family Engagement Rubric
- Merit review process
- Communication and dissemination of PCOR research findings

By offering CMEs/CEs for such content, PCORI will:

- Support clinicians in maintaining professional excellence in medical, nursing, and pharmacy practice and patient care in the important substantive areas identified by PCORI
- Continue to strengthen the collaborative relationships we currently have with clinicians
- Expand our reach to clinicians who may wish to become involved with PCOR and PCORI

Contractors who are selected through this RFP will directly manage the project, interface with key PCORI program staff members, ensure adherence to the approved budget, meet established deadlines, and provide recommendations for PCORI follow-up actions, as appropriate.

The contractors who are selected through this MSA must be able to:

- Demonstrate a thorough understanding of PCORI’s mission and goals
- Demonstrate a thorough understanding of patient-centered outcomes research (PCOR) and patient and other stakeholder engagement principles
- Demonstrate sustained experience and expertise in the CME/CE accreditation process and adherence to requirements of the Accreditation Council for Continuing Medical Education (ACCME) and other applicable national accreditation bodies
- Articulate their plan for entering into a partnership with PCORI, including:
  - Conducting a needs assessment to determine the likely clinician audiences for PCORI’s CME/CE content
  - Planning and executing live and online educational activities to maximize the impact of CME/CE
  - Promoting PCORI CME/CE educational activities
- Tracking and reporting on educational activity completions and issuing CME/CE certificates
- Fulfilling requirements of applicable accreditation bodies in partnering with PCORI and developing and providing CME/CE credits

Contractors are encouraged to demonstrate an understanding of the attributes mentioned above in their proposals.
Project Requirements

Scope of Work

The purpose of this statement of work is to define the services that may be requested under individual Task Orders on this MSA contract. These services may include conducting a needs assessment, planning and executing accredited educational activities, promoting accredited educational activities, and tracking and reporting on educational activities. An individual Task Order may require one or more of these services.

Conducting a Needs Assessment

The contractor will conduct a needs assessment of specialties and subspecialties to determine the audiences for PCORI’s CME/CE content. Although special emphasis should be given to the following professions, we would like the contractor to identify additional audiences as appropriate:

- Primary care and specialty physicians
- Physician assistants
- Registered nurses (RNs) and nurse practitioners (NPs)
- Pharmacists

Planning and Executing Educational Activities

Based on the results of a needs assessment of CME/CE audiences, the contractor will plan and develop live and online CME/CE activities that integrate patients, caregivers, clinicians, and other healthcare stakeholders as planners and presenters. All activities will be branded to PCORI. PCORI will retain the option to involve external reviewers of educational activities.

The contractor will host online CME/CE activities and provide to PCORI a link to these activities to be posted on our website. Technology-based educational activities must comply with Section 508 compliance of the Rehabilitation Act of 1973.

Following each CME/CE activity, the contractor will administer a post-activity survey to learners to evaluate their satisfaction with the educational activity and obtain additional topics of interest to learners.

The contractor will assume complete responsibility for managing the post-activity documentation process, including issuing CME/CEs and providing CME/CE certificates and transcripts to learners.

The contractor will review educational activities each year and may revise the activities to ensure currency of content and educational effectiveness of delivery format.

All assessment and educational activities will meet requirements of applicable accreditation bodies.
Promoting Educational Activities

A strong plan to promote PCORI’s CME/CE educational activities will be an important asset. The contractor, in consultation with PCORI, will determine the best ways to promote activities to the identified audiences and drive participation in these activities. PCORI is particularly interested in the use of online promotion strategies to reach clinicians in multiple channels where they may search for education. All promotion plans and activities will meet requirements of applicable accreditation bodies.

Tracking and Reporting on Activity Completions

The contractor will provide to PCORI electronic monthly reports of educational activity completions, by specialty and subspecialty. PCORI and contractor will agree on other components of reports appropriate for the particular CME/CE activity and audience.

Key Deliverables

A Master Services Agreement will be issued and Task Orders issued under the MSA will provide key deliverables if and when required.

Period of Performance

The period of performance for the MSA will be five years with a three-year base period and two one-year option periods. The projected MSA award date is September 19, 2014.

Other Requirements

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 Task Orders under the MSA. 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 a.m. and 5 p.m. 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, Columbus Day, Veterans Day, Thanksgiving Day, and Christmas Day.
Insurance

The Contractor, at its own expense, shall provide and maintain 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 deaths 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 Agreement

The Contractor shall not release any sensitive, confidential, or proprietary information without prior written approval from PCORI. At the time of award, the awardee will be required to sign a Non-Disclosure Agreement (NDA), and at each subsequent option year, if exercised.

Organizational Conflict of Interest

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

Compliance

The Contractor will maintain acceptable accreditation status with applicable accreditation bodies and fulfill requirements of applicable accreditation bodies. 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.
Proposal Evaluation Criteria

Overview

PCORI will evaluate proposals in compliance with the Scope of Work and requirements stated in this RFP. Multiple MSA awards will be made to the contractors who provide the best technical solutions. PCORI will consider the evaluation factors indicated below. See Submission Guidelines (below) for a description of the categories.

<table>
<thead>
<tr>
<th>Category</th>
<th>Weight of Rating Factor</th>
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<tbody>
<tr>
<td>Technical Solution</td>
<td>40%</td>
</tr>
<tr>
<td>Management Approach</td>
<td>20%</td>
</tr>
<tr>
<td>Past Performance</td>
<td>40%</td>
</tr>
</tbody>
</table>

PCORI will assign the following evaluation scores:

- **Outstanding**—The Offeror has demonstrated that there is a high probability of success in a combination of past results, low risk, and professional distribution of services.
- **Good**—The Offeror has demonstrated that there is a good probability of success in a combination of past results, moderate risk, and professional distribution of services.
- **Fair**—The Offeror has demonstrated that there is marginal probability of success in a combination of past results, marginal risk, and professional distribution of services.
- **Poor**—The Offeror has not demonstrated that there is a reasonable probability of success in this services-based effort.
Submission Guidelines

Submissions should be organized into one volume. All text should be Arial or Times New Roman font, no less than 11 point with 1-inch margins and single spaced. Graphics and tables may be included. We accept MS Word, MS Excel, or Adobe PDF formats. To ensure completeness, please refer to the Offeror Checklist (Appendix B).

Each submission must include a cover letter with following information:

- Offeror’s name and mailing address
- Reference to the solicitation (RFP) number (PCO-ACME&CEC2014)
- 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 quote 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

Questions must be submitted to rfp@pcori.org, referencing RFP# PCO-ACME&CEC2014 in the subject line, no later than 5 p.m. (ET) on August 18, 2014.

Volume 1: Technical Proposal

Describe a plan to provide, prioritize, and manage the tasks included in the Scope of Work (page 4) Describe the knowledge, experience, and capabilities related to provision of the range of support needs described. Such expertise may be provided either by CC employees or through subcontracts for professional services.

1. Statement of Understanding
   - State a clear understanding of the mission of PCORI and this project.
   - Maximum length: 2 pages

2. Technical Solution
   - Describe your proposed approach to each requirement included in the Scope of Work.
   - Maximum length: 25 pages

3. Management Approach
   - Describe a plan to manage the operation to ensure successful program support, including program
management, financial resources or ability to obtain them, equipment and facilities, quality assurance, internal controls, and staffing.

3.2 Management Plan

- Describe the overall plan for organizing, staffing, and managing the tasks required by the SOW. The plan shall indicate how roles and responsibilities will be divided, decisions made, work monitored, and quality and timeliness assured.

- Explain how this management and staffing plan will enable the Offeror to start projects quickly, conduct multiple projects concurrently, complete complex tasks within narrow time periods, and assure quality of products.

- Maximum length: 4 pages

3.2 Proposed Project Team Members

- List proposed project team staff, subcontractors, and consultants. Identify key personnel and project manager. For key personnel, state the level of effort.

- Provide resumes for all proposed team members. Include proposed job title and a brief description of qualifications, including education and experience. Resumes should be no longer than two pages.

- Describe how the individual expertise of each proposed team member and the combined, complementary expertise of the project team are appropriate for supporting each of the requirement sections of the RFP.

- Maximum length: 5 pages

3.3 Subcontracting Plans

- If the proposal includes subcontractors, we encourage large businesses to meet federal small business, labor surplus area, and minority business requirements.

4. Corporate Qualifications

The work described in this RFP must be performed quickly and meet exceptionally high quality standards. It is essential that the Offeror demonstrate the technical and subject-matter expertise to design and conduct the activities described in the Scope of Work and to put qualified staff in place to begin work rapidly. The Offeror must also have the ability to organize and manage resources and personnel effectively.

- Describe projects that are currently being managed.

- Provide a discussion of directly relevant technical and substantive experience, including a list of prior, similar projects.
Describe experience related to CME/CE projects and explain how the experience is relevant to fulfilling the requirements of this proposed contract. Provide current and historic accreditation status with applicable accreditation bodies.

Maximum length: 4 pages

5. Past Performance

It is essential that the Offeror demonstrate the previous experience required to design and conduct the various activities described in the Scope of Work. Of particular interest is experience in responding to similar requests from other clients or customers.

- For the Offeror and each proposed major subcontractor, identify up to three existing projects or projects completed within the last five years that are consistent in scope, nature, and effort for commercial customers, non-profit clients, or local, state, or federal governments.
- Complete table in Appendix A.
- For each selected project, submit a synopsis of work performed (no longer than two pages). Provide information on problems encountered on the contracts and subcontracts and corrective actions taken to resolve those problems. Do not provide general information on performance on the contracts because we will obtain that information from the references.

Submission Deadline

All proposals should be sent no later than 5 p.m. (ET) on August 29, 2014, to rfp@pcori.org with RFP # PCO-ACME&CEC2014 in the subject line.
Post-Submission Information

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 no 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.

Best and Final Offers
At its discretion, PCORI reserves the right to also invite Offerors who are technically acceptable to make a presentation to PCORI on the proposed effort for technical and management approaches identified in the submission. PCORI will notify vendors who meet the qualifications and provide the date, time, and format for the presentation.

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

Protests
Any actual or prospective Contractor who is aggrieved in connection with the solicitation or award of a contract must file a protest with PCORI no later than 10 business days after the basis of protest is known or should have been known, whichever is earlier. A protest based on alleged improprieties in a solicitation that are apparent prior to proposal opening or the time set for receipt of initial proposals shall be filed with PCORI prior to proposal opening or the time set for receipt of initial proposals. For procurements in which proposals are requested, alleged improprieties that do not exist in the initial solicitation, but which are subsequently incorporated into the solicitation, must be protested no later than the closing time for receipt of proposals. The protest shall be filed in writing. Protests should be submitted to finance@pcori.org or mailed to:

PCORI
Attn: Finance Department
1828 L Street, NW, Suite 900
Washington, DC 20036
Post-Award Information

Anticipated Award Date
The anticipated notice of award date is September 19, 2014

Notice to Proceed
Immediately upon receipt of notice of award, the Contractor shall take all necessary steps to prepare for performance of the services required hereunder.

Period of Performance
The performance period of this contract is from the start date established in the Notice to Proceed and continuing for a three-year period. The initial period of performance includes any transition period authorized under the contract.

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 Cost Reimbursable contract for the SOW and budget 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.

Debrief – Post-Award
Offeror shall receive a post-award debriefing provided a written request is submitted to rfp@pcori.org within three calendar days of the Notice of an Award. PCORI will provide verbal or written debriefs.
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
Appendix A: Past Performance Chart

Offeror shall submit the following information as part of the proposal for both the Offeror and proposed major subcontractors: a list of three contracts completed during the past five years or currently in process. Contracts listed may include those entered into by the federal government, agencies of state and local governments, and commercial clients. Include the following information for each contract and subcontract:

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<tr>
<th></th>
<th>Contract 1</th>
<th>Contract 2</th>
<th>Contract 3</th>
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<tbody>
<tr>
<td>• Name of contract</td>
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<td></td>
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</tr>
<tr>
<td>• Name of client or customer</td>
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<tr>
<td>• Contract type</td>
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<tr>
<td>• Dates of performance</td>
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<tr>
<td>• Total contract value</td>
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<tr>
<td>• Program manager and telephone number</td>
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<tr>
<td>• Contracting officer and telephone number</td>
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<tr>
<td>• Administrative contracting officer, if different from contracting officer, and telephone number</td>
<td></td>
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<tr>
<td>• List of major subcontracts</td>
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### Appendix B: Submission Checklist

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<thead>
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<th>Length</th>
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<tbody>
<tr>
<td><strong>Cover Letter</strong></td>
<td></td>
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<tr>
<td>□ Cover Letter <em>(see page 8)</em></td>
<td>As needed</td>
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<tr>
<td><strong>Volume I: Technical Proposal</strong></td>
<td></td>
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<tr>
<td>□ Statement of Understanding <em>(see page 8)</em></td>
<td></td>
</tr>
<tr>
<td>□ Technical Solution <em>(see page 8)</em></td>
<td>36 pages maximum</td>
</tr>
<tr>
<td>□ Management Approach <em>(see pages 8 – 9)</em></td>
<td></td>
</tr>
<tr>
<td>□ Past Performance <em>(see page 10)</em></td>
<td></td>
</tr>
<tr>
<td>□ Corporate Qualifications <em>(see pages 9 – 10)</em></td>
<td>4 pages</td>
</tr>
<tr>
<td>□ Resumes of Key Personnel <em>(see page 9)</em></td>
<td>2 pages per resume maximum</td>
</tr>
<tr>
<td>□ Appendix A: Past Performance Table <em>(see page 14)</em></td>
<td>As needed</td>
</tr>
<tr>
<td>□ Appendix C: Performance Monitoring <em>(see page 16)</em></td>
<td>Not Required</td>
</tr>
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Appendix C: Performance Monitoring

PCORI will assess the performance of the Contractor according to the criteria established in each Task Order issued under the Master Service Agreement.