

Comprehensive PCORI Training Curriculum Development Project
RFP # PCO-TRNG2013

QUESTIONS and ANSWERS

- Q1. What vendor developed the curriculum content for the first two courses and what was the individual budget for each course, or the cumulative budget for the two courses?
- A1. PCORI developed existing curricula with in-house resources. There is no precedent for this curricula development project. Nevertheless, PCORI expects to receive innovative proposals with reasonable cost proposals.
- Q2. For existing courses, will PCORI provide guidance on needed revisions to content, or is the contractor charged with gathering this information from stakeholders for each course?
- A2. PCORI will provide guidance, but may recommend in some cases to collect input from stakeholders for additional input and customization.
- Q3. For those courses still to be developed, will PCORI staff provide the content that the contractor will use to develop the courses, or is the contractor charged with developing the curriculum content for these courses? Is the contractor responsible for translating all materials to Spanish?
- A3. PCORI will work in partnership with the selected contractor(s) to develop the curricula. Each PCORI program directorate will provide basic input, past / associated materials, and the initial framework for the curricula. However, it is expected that the Contractor will develop the final curricula based on PCORI input, feedback, and learning objectives.
- Q4. What is the preferred Learning Management System (LMS) that PCORI uses for its online courses—an open-source software such as Moodle, or a proprietary LMS? One way to interpret the RFP is that the contractor should plan to develop the complete working computer based training system to deliver the PCORI curriculum, while another way to read it suggests that this is only a design phase. Please clarify.
- A4. PCORI does not have an existing LMS. PCORI expects the Contractor(s) to recommend an LMS based on a needs assessment and initial consultations with PCORI. PCORI expects the Contractor(s) to develop the courses and management systems, and then hand-off the end products to PCORI. PCORI is currently evaluating the efficacy of establishing an in-house Training Department.
- Q5. Is PCORI anticipating that the contractor will provide ongoing technical support, stakeholder or user software usability testing, hardware or delivery mechanisms, and support for delivery mechanisms such as tables and mobile devices?

PCORI Training Curriculum Development Proposal

- A5. PCORI anticipates that contractor will incorporate usability testing with stakeholders of hardware /software and delivery mechanisms. Please have your budget reflect the expectation for ongoing support for these types of services.
- Q6. Please elaborate on expectations for the Section 508 compliance of the training modules. For example, are there particular screen reader technologies that need to be supported and will videos used in the training modules need to be closed captioned?
- A6. Please share Section 508 compliance solutions that meet or exceed industry standards that you have created for other clients as an example of potential solutions for PCORI.
- Q7. The RFP makes repeated mention of "webinars" as part of the training. Generally webinars are live sessions conducted with an instructor at a specific date and time. Is this the expected means of training, or does PCORI actually want video presentations with some amount of user interactivity that can be viewed at any time without the need for an available human teacher?
- A7. BOTH and will vary by curriculum.
- Q8. To what extent should users' scores/results on the assessment be stored? Is some form of "certification" of results required? Will users need to provide some verification of their identity to receive "certification" and what kinds of aggregate data will PCORI want to be able to obtain? What kinds of reporting tools will be needed?
- A8. Please submit possible solutions for assessment score organization and storage. A completion certificate would be preferred and we welcome your suggestions on the kinds of aggregate data that are typically required. Reporting tools will be determined during the discovery phase.
- Q9. Should safeguards be included in the system to prevent cheating on the assessments?
- A9. PCORI is seeking state-of-the-art curricula. Systems to prevent cheating (and corresponding budget detail) would be welcome.
- Q10. Many of the deliverables are listed in the RFP as "to be determined." The offeror's budget projections are dependent on amount of effort required to perform the required scope of work and deliverables. Can PCORI provide more detail about the deliverables?
- A10. PCORI does not have a legacy training operation - this is a new venture. So, many of the course elements are unknown.

The Deliverables table listed on page 13 of the RFP provides the framework expected for each curriculum. Therefore, Offerors are encouraged to prepare their Cost Proposals with that framework in mind.

Further, the selected Contractor(s) will be expected to analyze the current state of PCORI curricula, training needs, and course-by-course expectations. Then – in conjunction with PCORI – the Contractor(s) will recommend and negotiate those specific elements that may be added / eliminated from each curriculum.

- Q11. Is the contractor responsible for final production of all courses, including animation?

PCORI Training Curriculum Development Proposal

A11. Yes.

Q12. For the contractor to perform high-quality work and to build the courses in time for materials review, revision, and final production (if required), the timeline of due dates appears to be ambitious. Is there room for negotiating due dates to allow time for the contractor to ensure that it delivers accurate and high-quality work?

A12. Yes.

Q13. What is the expected scope of work for Option Year 1?

A13. To be determined during the discovery phase.

Q14. The RFP states on page 2 "This Request for Proposal (RFP) is for an immediate, six month project base, with an option up to one year of total Contractor engagement." There are two interpretations: 6 month base + 1 year option or 6 month base + 6 month option for a total of one year. Can you confirm the period of performance?

A14. Total of one year.

Q15. Will the proposal cover, transmittal letter and TOC count towards the 10-page limit?

A15. No. "The Technical Solution, Management Approach, and Past Performance should be addressed in the Technical Proposal. This section should be no longer than 10 pages and sent via the acceptable formats noted below in Section 5."

Q16. Page 3 of the solicitation under Purpose, it states among other phases that the services shall include "implementation". Does PCORI expect a delivery of the training component in our bid after producing the materials?

A16. Most of the curricula will be delivered by PCORI as on-line computer based training (CBT), however, where indicated that instructor led training is desired there may be a requirement for in person delivery.

Q17. Will PCORI staff provide the majority of the content for the development of each course and/or make available sufficient personnel to capture the content?

A17. Please see Answer #3.

Q18. When indicating "Text curriculum and computer-based training (CBT), as a minimum" for the delivery modality in selected course descriptions (Appendix), are you envisioning two forms of delivery: Instructor-led and on-line/CBT for those courses?

A18. Please see Answer #16.

Q19. Does PCORI have an existing training infrastructure that supports on line learning management and if not is PCORI seeking one?

A19. PCORI is looking to develop an internal training program that is comprehensive and can be implemented and supported internally.

Q20. Does PCORI have a range estimate in terms of budget or person hours for this RFP? Is there a budget limit?

PCORI Training Curriculum Development Proposal

A20. No. This is a Best Value RFP with an Offeror's ability to provide a technical solution being paramount to other factors, including cost. The primary constraint is on period of performance and expected time to develop and deliver curricula. Offerors should ensure that they address staffing and timeline needs in their technical and cost proposals.

Q21. Is the required cover letter considered outside of our 10 page technical proposal response?

A21. Please see Answer #15.

Q22. Does PCORI have a preferred authoring tool that should be used for CBT development?

A22. No.

Q23. What Learning Management System or Learning Content Management System does PCORI use, if any?

A23. Please see the answers to #4 and #19.

Q24. Please clarify which groups of resources (e.g., PCORI staff, patients, stakeholders) will need to be compensated by the contractor and how many of each resource type is expected to participate in the development.

A24. There is no requirement or threshold for patient / stakeholder participation. But, it is expected that all stakeholders and patients that are engaged as part of the curricula development process will be properly compensated (see page 11 of the RFP for guidelines). PCORI is an organization that requires patient and stakeholder participation during all phases of the research cycle: need assessment; research design, conduct of research, and the dissemination and implementation of results. Accordingly, proposals that capitalize on the fact that PCORI will compensate the engaged patients and stakeholders will more closely align with both PCORI organizational mission and curricula development project goals.

Q25. Will the contractor be responsible for identifying patients and stakeholders to involve in the development process?

A25. YES, however PCORI can also provide recommendations

Q26. Will the contractor be responsible for hiring instructors to teach instructor-led portions of the program?

A26. No. The Contractor(s) can make instructor recommendations, especially recommendations on qualification, experience, and skill sets. However, the curricula should be packaged for hand-off to PCORI. Separate from this solicitation, PCORI will identify and procure instructors for subsequent PCORI trainings. Offerors are welcome to submit plans (and budgets) to educate PCORI staff and agents during train-the-trainer offerings once the curricula are complete.

Number of Courses and Delivery Dates

PCORI Training Curriculum Development Proposal

Q27. Page 8 Para 1 re: “develop or customize at least twelve (12)....courses.” Please define how many courses are to be developed as opposed to customized?

A27. PCORI currently has two curricula that were previously developed and are in use: Merit Reviewer Training and PCORI 101. Additionally, the course for Chairs is already in development, but will need enhancements and CBT. The rest of the courses have at least moderate amounts of background and conceptual materials, but need comprehensive development.

Q28. Your annex provides a “Best Date” and “No Later Than” schedule for course delivery that spans June 2013-January 2014; how flexible is this schedule?

A28. PCORI is prepared to negotiate on timeline.

Course development status

Q29. How many and which courses have “received extensive development and require only slight updates.”

A29. Please see answer #27.

Q30. For the extensively developed courses, have stakeholders been identified? Interviewed? What remains to be done?

A30. In the reviewer training curriculum and chair training stakeholders have been identified and additional interviews can be requested, however additional stakeholders and interviews can be proposed by contractor.

Travel costs

Q31. Can you describe the locations of patients and stakeholders if not DC?

A31. It would depend on the curriculum and potentially on the location of the contractor.

Q32. How many patient and stakeholders do you expect to have interviewed face to face?

A32. PCORI anticipates that contractors will partner with patients and stakeholders in the entire development of the curricula to the extent deemed necessary to create a relevant, robust curricula.

Q33. Since the travel is to be reimbursed at cost and is not part of the fixed price, do you want a separate travel budget?

A33. Yes – any and all travel should be fully justified, relevant, and tied to the successful completion of this project. Travel expenses generally follow federal per diem guidelines and are only reimbursed, at cost.

Q34. Our usual practice would be to include indirects and fee on the travel costs: is this expected?

PCORI Training Curriculum Development Proposal

A34. PCORI will consider indirect costs; including F&A, G&A, overhead, fees, fringe, etc. However, all costs must confirm to your organization's past precedent and be treated in a consistent manner across similar projects. PCORI reserves the right to demand independent validation of all proposed costs or remove them from the contract budget. Acceptable documentation includes federally-approved F&A rate agreements, NICRAs, independently audited financial statements, fringe benefit plan cost statements, and examples of like-charging practices on similar or other federal projects.

Key Personnel

Q35. How many proposed staff CVs require approval?

A35. Please provide the staff CVs for your proposed team within your response.

Q36. If the PM is not the sole key staff in the project team for whom you require a CV, please indicate the others.

A36. Please provide the staff CVs for your proposed team within your response.

Q37. Page 11 - Other Staff/Subcontractors

A37. N/A

Q38. How many patient and stakeholders do you foresee being interviewed and participating in the training?

A38. Please see answer #32.

Q39. Do we build in costs for compensating PCORI staff for interviewing and training?

A39. No.

Q40. Page 15 - PCORI's Rules and Regulations. Please provide a copy or link.

A40. That information, if disclosed, will be provided to the Awardee.

Q41. If this is to result in a fixed-price contract, what do you mean by "with up to a one year option"?

A41. Please see answer #14.

Subject Matter Experts (SMEs)

Q42. How many subject matter experts are available per training course?

PCORI Training Curriculum Development Proposal

A42. PCORI has dedicated at least one staff member per course. Contractors are advised to propose (and include expenses) for their team of SMEs. But, PCORI can also provide recommendations on outside SMEs that can be contracted. Offerors should budget reasonable amounts for SMEs based on their role on the project. Rates can be reviewed, approved, and adjusted by PCORI as needed to support the project.

Q43. Please clarify the expectations regarding the subject matter experts. Which party is responsible for recruiting and compensating the SMEs? How will we engage with the SMEs (e.g., how to assemble them, is it possible to get them all together, etc.)?

A43. Please see answer #42.

Q44. Is it expected that all SMEs will speak English?

A44. Yes. Offerors may also propose Spanish-speaking SMEs if it integrates with their approach to development, but English is required.

Candidates

Q45. How many candidates does PCORI anticipate per training course? Any international candidates?

A45. Will vary per learner group. (Most curricula will be delivered via computer based learning in Standard English.)

Q46. Is there eligibility criteria for any or all of the training courses? If yes, who will determine eligibility, and who will store candidate data?

A46. PCORI determines eligibility; controls course admissions; and manages all of the data storage. PCORI is seeking innovative (and efficient) systems that can assist with these processes.

eLearning:

Q47. Does PCORI currently have an LMS (learning management system)? If yes, please provide LMS details. If no, does PCORI anticipate that the vendor will house and deliver the training courses?

A47. Please see answer #4.

Q48. How is PCORI currently storing, delivering and tracking the training and/or exams (i.e., what software(s) is being utilized)?

A48. Please see answer #4.

Q49. Is PCORI currently delivering all training/exam via online?

A49. No.

Q50. What type of interactivity is PCORI interested in for the training courses (e.g., level 1, level 2, level 3, and level 4)?

PCORI Training Curriculum Development Proposal

A50. Contractor shall develop “innovative training systems and technologies” to fulfill the needs outlined in the Statement of Work.

Q51. How is the content basis for the training and tests determined? That is, have learning objectives been defined for all training courses and are the learning objectives weighted?

A51. Yes, learning objectives are documented in Appendix A and are not weighted.

Q52. If the training/tests will be available to international participants, will any translations be required?

A52. PCORI envisions developing a curriculum in English to begin with and consider translation at a later point that will be covered by other resources not included in this contract.

Q53. What is the anticipated duration of the e-learning and instructor-led courses (by course, or minimum/maximum duration anticipated)?

A53. PCORI will work in partnership with contractor to determine length and exam details to best optimize learning, see Appendix A.

Competency Examinations

Q54. What is anticipated length (time and number of questions) for each of the 6 competency examinations? Please provide a sample of an examination.

A54. PCORI will work in partnership with contractor to determine length and exam details to best optimize learning.

Q55. What is the anticipated format of the exam (e.g., multiple choice, true/false, Likert scale, etc.)?

A55. PCORI will work in partnership with contractor to determine length and exam details to best optimize learning.

Q56. Will the exams be administered at the conclusion of the training course? If not, how long does the candidate have to take the exam?

A56. PCORI will work in partnership with contractor to determine length and exam details to best optimize learning.

Q57. How will the candidate take the exam? Online? By themselves or with a proctor (either online or at a testing center)?

A57. Online.

Q58. If a candidate fails the exam, will the candidate be required to retake the training and exam, or just the exam?

A58. Please see answer #56.

Q59. Are candidates required to pass the exam of one course prior to taking another course?

PCORI Training Curriculum Development Proposal

A59. Please see answer #56.

General Business

Q60. Please provide a copy of PCORI's Rules and Regulations (page 15 of the RFP).

A60. Please see answer #40.

Q61. Is PCORI open to a longer schedule, provided the vendor offers good reason for the additional time?

A61. Please see answer #28.

Q62. For the appendices that have answers marked "TBD", when will this data become available? Prior to the proposal deadline or after contract award?

A62. After the award.

Q63. Castle notes that the RFP details a 6-month timeline (June-December 2013); however, Castle notes that page 45 lists a January 2014 "no later than" delivery date for the PCORI Patient and Stakeholder Evaluator. Please advise.

A63. Delivery dates of some of the courses are still TBD as indicated on page 45 of the RFP.

Q64. Is the required cover letter considered outside of our 10 page technical proposal response?

A64. Please see Answer #15.

Q65. Does PCORI have a preferred authoring tool that should be used for CBT development?

A65. No.

Q66. What Learning Management System or Learning Content Management System does PCORI use, if any?

A66. Please see answer #4.

Q67. Please clarify which groups of resources (e.g., PCORI staff, patients, stakeholders) will need to be compensated by the contractor and how many of each resource type is expected to participate in the development.

A67. Please see answer #32.

Q68. Will the contractor be responsible for identifying patients and stakeholders to involve in the development process?

A68. Yes

Q69. Will the contractor be responsible for hiring instructors to teach instructor-led portions of the program?

A69. PCORI will work with contractor on a case by case basis. Most curricula will be via computer based training.

Q70. Is the option year 6 or a year?

PCORI Training Curriculum Development Proposal

A70. Please see answer #14.

Q71. Do you expect respondents to provide an estimated LOE and cost proposal for the base period and the option period?

A71. Please see answer #14.

Q72. Is the curriculum evolution plan the same as the process improvement suggestion?

A72. Yes

Q73. Will the training courses be owned by different individuals within the organization or will there be one contracting officer?

A73. PCORI will work in partnership to develop the curriculum. Each program directorate and/or staff will provide basic input and framework for curriculum; however, contractor will develop the final curriculum based on PCORI input.

Q74. Who is the POC to send the proposal to?

A74. RFP@pcori.org

Q75. In PCORI 101 section, you list potential project team members as “staff”, however in the other sections PCORI staff are identified as “staff.” Can we go with our own staffing structure for development of courses or is there a list of recommended staff within PCORI who will not only be the SMEs but also will be involved in the development for each course?

A75. PCORI will work in partnership to develop the curricula. Each program directorate and/or staff will provide basic input and framework for curriculum; however, contractor will develop the final curriculum based on PCORI input.

Q76. Do we need to provide the suggested length for the courses where it was not provided?

A76. Yes.

Q77. What does PCORI mean by “Collaboration and communication across divergent perspectives in research?” Why is it listed in all courses? Should the contractor address this in each course in a unique way?

A77. PCORI requests the development of a curriculum dedicated to the “acculturation” of scientists, patients and other stakeholders to create productive partnerships in research, to use a shared and understandable language to reduce the power imbalance, align incentives, and to foster mutual respect for the unique contributions that each stakeholder can make to the design, conduct and dissemination of research.

Q78. You state that the Technical Volume should be 10 pages, with the exception of resumes. Do Past Performance’s count in the 10 page count?

A78. Please see instructions on page 17 of the RFP.