



Patient-Centered Outcomes Research Institute

REQUEST FOR PROPOSAL
RFP #PCO-TRNG2013

Comprehensive PCORI Training Curriculum Development Project

Updated April 12, 2013

KEY DATES	
ACTION	DATE
RFP Released	April 12, 2013
Deadline for RFP Questions	April 26, 2013
Deadline for Proposals	May 17, 2013
Projected Award Date	May 31, 2013
Projected Start Date—PCORI Training Project	June 5, 2013

Opportunity Snapshot

The Patient-Centered Outcomes Research Institute (PCORI) was created to conduct research to provide information about the best available evidence to help patients, their caregivers, and their health care providers make more informed decisions. PCORI's research is intended to give patients a better understanding of the pros and cons of the prevention, treatment, and care options available to them.

PCORI is unique both in its mission—focusing on patient-centered outcomes research—and how it seeks to fulfill it by advancing research that is guided by patients, caregivers, and health care stakeholders.

For the purpose of PCORI research and training initiatives, the term *patients* refers to patients, caregivers, and patient and caregiver organizations. The term *stakeholders* refers to clinicians and clinician associations, organizational providers, purchasers, payers, the pharmaceutical/biotech/medical device and equipment industries, researchers, policy makers, and educational institutions.¹

Given its commitment to patient and stakeholder engagement, a priority of PCORI is to establish a community of trained and informed patients, caregivers, and stakeholders who participate as valued partners in all stages of the research process and understand patient-centered outcomes research and methodologies. PCORI engages patients and stakeholders in the identification and prioritization of important research topics, the merit review process, the design and conduct of research, and the dissemination and implementation of research results.

This Request for Proposal (RFP) is for an immediate, six-month project base, with an option up to one year of total Contractor engagement. In order to accomplish the Scope of Work (SoW), PCORI is seeking a partner organization that will work to (1) analyze the current state of PCORI training efforts, (2) formulate custom curricula for twelve course concepts, (3) design curricular materials in a variety of presentation and learning formats, and (4) ensure that all PCORI curricula have consistent “feel,” messaging, themes, and format.

The current state of PCORI training curricula is incongruous. Some courses are developed, but in need of revision and updating. Other courses have received extensive development and require only slight updates. Finally, some courses for key patients, stakeholders, and PCORI staff have yet to be developed. These reasons are why PCORI is seeking a partner, or partners, that can work collaboratively to standardize PCORI training curricula throughout the organization.

PCORI expects to develop multiple learning and delivery formats. Some courses will only require a simple text or computer-based training (CBT) interface for self-paced learning. Conversely, other courses will require multiple delivery and learning formats, to include webinars, CBT, interactive and facilitated courses, along with marketing materials to engage

¹ A New Taxonomy for Stakeholder Engagement in Patient-Centered Outcomes Research. 2012. Concannon TW. *J. Gen. Intern. Med.*

potential patient and stakeholder audiences. Offerors should leverage successful past curriculum development projects and propose innovative training solutions.

Purpose

The Contractor(s) chosen shall provide training program development and support services to include the analysis, design, development, implementation, evaluation, and process improvement recommendations for twelve (12) PCORI training courses:

1. PCORI 101
2. PCORI Scientific Advisory Panels
3. PCORI Merit Reviewers (researcher and non-researcher)
4. PCORI Applicants for Research Contracts
5. PCORI Awardees of Research Contracts
6. PCORI Program Officers
7. PCORI Chairs of Advisory and Review Panels
8. PCORI Ambassadors
9. PCORI Engagement Awards – Applicants
10. PCORI Engagement Awards – Awardees
11. PCORI Patient Engagement Advisory Panels
12. PCORI Patient and Stakeholder Evaluators

Please refer to the Appendix for descriptions of the learners and the learning objectives of each course.

PCORI expects the chosen Contractor(s) to establish a partnership during the course of the engagement. A successful Contractor will need to work closely with PCORI staffs assigned to this project in order to understand the unique training needs across functional areas, make innovative recommendations on course design, and create a portfolio of training products that can be readily implemented.

This RFP also seeks a curriculum evolution plan. Offerors should propose a system to release the courses; evaluate effectiveness; and periodically improve and enhance course content. The plan should identify improvements in the following key areas:

- Maintaining and updating the training curriculum
- Maximizing the effectiveness of training delivery and, where relevant, instructor effectiveness
- Learner, instructor, and course evaluations
- Recommended technology enablers
- Cost-saving strategies
- Maximizing outreach and distribution of the curricula in an efficient and cost-effective manner

Funds Available, Budget, and Project Periods

PCORI expects to make one or more awards under this RFP. The expected award(s) will be Firm Fixed Price (FFP) contracts inclusive of all project costs. Contractors may choose to pursue one or more of the training courses instead of the entire course development project. However, organizations with prior experience successfully completing similar curriculum development projects for like organizations are strongly encouraged to submit a proposal (please see the Weighting Matrix section of the RFP). The expected award(s) will be best value. Project funding decisions will be based on the innovative aspects of technical approach, the competency and past experiences of the project team, and the merits of successful prior curriculum development projects.

Responding organizations must include all expected expenditures and fees in their final bid. Travel costs in support of the proposed Scope of Work (eg, travel to and from PCORI, travel to collect patient and stakeholder input, and so forth) must receive prior PCORI approval and will be reimbursed at cost. Organizations must provide a pricing proposal that supports the scope of work outlined in the following section of the RFP.

The period of performance is six months (June–December, 2013), with an option for a total engagement period up to one year. The anticipated contract award date is approximately May 31, 2013.

Organizational Eligibility

Proposals may be submitted by any private sector organization, including non-profit and for-profit organizations; any public sector research organization; universities; colleges; hospitals; laboratories; health care systems; and units of state and local governments. The Internal Revenue Service must recognize all US organizations.

Table of Contents

Opportunity Snapshot	2
<i>Purpose.....</i>	<i>3</i>
<i>Funds Available, Budget, and Project Periods.....</i>	<i>4</i>
<i>Organizational Eligibility.....</i>	<i>4</i>
Step 1: Review the Program Detail.....	8
<i>Overview—Scope of Work</i>	<i>8</i>
Step 2: Consider the Requirements.....	10
<i>Overview—Requirements for Providing Comprehensive PCORI Training Curriculum</i>	
<i>Development Services</i>	<i>10</i>
<i>Program Management</i>	<i>10</i>
<i>Key Personnel</i>	<i>11</i>
<i>Other Staff/Subcontractors.....</i>	<i>11</i>
<i>Curricula Development</i>	<i>11</i>
<i>Training Delivery</i>	<i>12</i>
<i>Deliverables.....</i>	<i>12</i>
<i>Place of Performance</i>	<i>13</i>
<i>Hours of Service</i>	<i>13</i>
<i>Type of Contract.....</i>	<i>14</i>
<i>Insurance.....</i>	<i>14</i>
<i>Contractor’s Quality Control and Quality Assurance Surveillance Plan.....</i>	<i>14</i>
<i>Compliance</i>	<i>15</i>
<i>Onsite Support.....</i>	<i>15</i>
<i>Furnishing of Equipment/Property</i>	<i>16</i>
<i>Period of Performance.....</i>	<i>16</i>
<i>Non-Disclosure Agreements (NDA).....</i>	<i>16</i>
<i>Organizational Conflict of Interest (OCOI).....</i>	<i>16</i>
Step 3: Develop Your Solution.....	17
<i>Overview—Proposal Content</i>	<i>17</i>
<i>Proposal Content.....</i>	<i>17</i>
Step 4: Know the Review Criteria	19
<i>Overview—Review Criteria</i>	<i>19</i>
<i>Matrix.....</i>	<i>19</i>
<i>Evaluation Categories.....</i>	<i>19</i>
<i>Best and Final Offers</i>	<i>19</i>
<i>Protests.....</i>	<i>20</i>
Step 5: Submit Your Proposal.....	21
<i>Overview—Summary of Instructions.....</i>	<i>21</i>
<i>Format.....</i>	<i>21</i>
<i>Cover Letter</i>	<i>21</i>
<i>Proposal.....</i>	<i>21</i>
<i>Submission Deadlines.....</i>	<i>22</i>
<i>Late Submissions.....</i>	<i>22</i>
<i>Retention of Proposals.....</i>	<i>22</i>



Withdrawal or Modification of Proposals..... 22

About PCORI..... **23**

Our Mission..... 23

Our History 23

Appendix **24**

PCORI 101 24

PCORI Scientific Advisory Panels 26

PCORI Merit Reviewer (Researcher and non-researcher) 27

PCORI Applicants for Research Contracts..... 29

PCORI Awardees of Research Contracts 30

PCORI Program Officers..... 32

PCORI Chairs of Advisory and Review panels 34

Training RFP Questions: PCORI Ambassadors..... 36

PCORI Engagement Award - Applicants..... 38

PCORI Engagement Award - Awardees..... 40

PCORI Patient Engagement Advisory Panels..... 42

PCORI Patient and Stakeholder Evaluators..... 44

Comprehensive PCORI Training Curriculum Development Project

If you are interested in submitting a proposal, follow PCORI's five-step process.



1. Review the Program Detail

Examine all sections of the RFP and what makes PCORI's research different (www.pcori.org/what-we-do/).

2. Consider the Requirements

Consider the organization eligibility requirements and PCORI's specific requirements to see if your organization, your interests, and your capabilities fit this program.

3. Develop Your Solution

Design your response to accomplish the Scope of Work; provide the needed consulting and curricula development services; and submit the deliverables on time. Determine and document the designated Program Manager, approach to curriculum development, and budget needs.

4. Know the Review Criteria

Understand PCORI's evaluation factors and how they are weighted. Details are provided in this RFP.

5. Submit Your Proposal

Compile and submit your proposal. All proposals must be submitted no later than 5 p.m. (EDT) May 17, 2013.

Step 1: Review the Program Detail



Overview—Scope of Work

The Contractor(s) selected will provide comprehensive PCORI training curriculum development consultation and development services. PCORI is soliciting a Contractor(s) that can immediately assemble a project team and launch a curriculum development program; make innovative recommendations on course formats, media, and instructional strategies; develop or customize at least twelve (12) distinct training courses that encompass PCORI objectives in the timeline listed in this RFP; create evaluation protocol(s); and provide formalized process improvement recommendations.

The objective of this effort is to provide expertise that can assist PCORI with the development and launch of the aforementioned courses and the implementation of a strategy, moving forward, as PCORI is evaluating the efficacy of launching a formal in-house training department in the coming year. The contract will formalize a fast-paced, six-month engagement with an option to extend the service for a total of one year. The requirements of the Contractor include, but are not limited to:

- The Technical proposal and associated Cost proposal should include clear plans to engage the patient and stakeholder community and prospective learners. The necessary levels of expenditure needed to compensate the project team, as well as the patient and stakeholder community (or resources utilized to access current feedback), should be delineated.
- Providing a designated Project Manager (PM) to interface with PCORI staff and manage the curriculum development, delivery and evaluation processes throughout the contract period.
- The PM is required to devise a plan to regularly interview and collect current feedback from PCORI staff, patients, and stakeholders; integrate needs and recommendations; and propose innovative course drafts and learning systems.
- Developing and implementing a process for analyzing PCORI's training needs.
- In partnership with PCORI staff, stakeholders, and patients, develop training curricula based on PCORI criteria, as well as best practices criteria for current industry-standard methodologies.
- Submitting curriculum development plans, draft curriculum, and final curricula, on-time.
- Developing competency examinations for six of the twelve courses: PCORI 101, Scientific Advisory Panels, Merit Reviewers, PCORI Funding Announcements (PFAs) Awardees, Ambassadors, and Program Officers. The aforementioned six courses have unique and specific examination needs because each course requires the learners to understand a series of learning objectives, and then apply them shortly thereafter. PCORI seeks a Contractor that has experience with scientific curricula for adult learners. The competency examinations must

check for understanding and accurately assess the learners' ability to perform a series of critical skills. As inferred from the course titles (Merit Reviewers, PFA Awardees, Program Officers, and the like), the learners will be expected to successfully apply the curriculum. Failure to accurately apply key learning objectives will render the courses ineffective and subsequently undermine the success of key PCORI initiatives.

- Creating and providing evaluation protocols that will help gauge and document training effectiveness.
- Strategically providing technology enablers and the subsequent revision, updating, and enhancement of all courses.

Step 2: Consider the Requirements



Overview—Requirements for Providing Comprehensive PCORI Training Curriculum Development Services

The Contractor will use a proven system to manage the project; interface with key PCORI program staff members; integrate feedback from PCORI patients and stakeholders; ensure adherence to the approved budget; manage the project phases and meet established deadlines; ensure quality control; and conclude the project with a series of recommendations that will enable PCORI to continue a training program in perpetuity.

Program Management

The Contractor shall provide the necessary staff to assure that the highest quality of service is provided. It is imperative that the Contractor demonstrate how it will formally engage PCORI staff, patients and stakeholders throughout the research and development process (at a defined expense clearly delineated in the Cost Proposal). The Contractor shall have the capability to manage the program from start to finish as described in this RFP. All Contractor personnel providing services under this contract shall be fluent in English.

The Contractor shall describe its experience and capabilities related to effective program management as it specifically relates to the following:

- Identifying audiences (ie, patients and stakeholders) and formally integrating their feedback, needs, and training goals into training programs. If direct audience engagement is not included in the SoW (eg, focus groups, interviews, and so forth), then the Offeror should ensure that all referenced feedback is current.
- Developing and/or customizing health-based, scientific, or related training curricula.
- Developing innovative training systems and technologies.
- Evaluating training and instructor effectiveness.
- Analyzing and preparing recommended process improvements as they relate to the overall project.
- Problem resolution methods for working with nonprofit organizations, commercial enterprises, academia, or other organizations during similar projects.
- Effective management of the unique staff members needed to execute the scope of work (educational methodologists, curriculum developers, trainers/facilitators, evaluators, and so forth).
- Successful past performance (on time and on budget) with similar projects.

Key Personnel

To provide effective program management, the Contractor shall provide a Program Manager (PM) who shall be responsible as the single Point of Contact (POC) for PCORI. The Program Manager shall have successful experience in the management of curriculum development programs. The PM must have adequate authority to make decisions on behalf of the Contractor for the timely resolution of problems. The PM shall coordinate closely with the PCORI Directorates for Science and Engagement during the entire project period. PCORI will provide oversight, guidance and direction, and the Contractor shall work collaboratively with PCORI to deliver the program and fulfill the requirements of the solicitation. Note that each PCORI department with a training course development need has dedicated at least one staff to interface with the Contractor's PM.

Other Staff/Subcontractors

The Contractor shall propose how it will staff the comprehensive training project to effectively execute all services described in this scope of work. It is imperative that the Contractor demonstrate how it will identify, solicit, formally engage, and translate the input from PCORI staff, stakeholders, and patients. It is expected that the patients and stakeholders will be appropriately compensated at a per-person rate of at least \$100.00/hour, up to \$600.00/day, through subcontracts or directly through the contracting organization, with the costs built into the cost proposal.

Curricula Development

The foundation for curriculum development will be "PCORI 101," a pre-existing foundations course in need of update. It should also be noted that there is a wealth of groundwork already developed for two other courses: PCORI Merit Reviewers and PCORI Chairs of Advisory and Review Panels. PCORI expects the chosen Contractor(s) to leverage this material and integrate the content into new courses. Accordingly, these three courses should have quicker development timelines.

The remaining nine courses are new concepts that must be developed for specific training audiences. The resultant curricula shall include a comprehensive text and CBT, at a minimum. Other courses will require full-scale computer-based training, facilitator-led training, webinars, and associated marketing and publication materials. While specific curriculum elements and detailed guidance on PCORI criteria will be provided to the chosen Contractor, organizations should note the descriptions of the learners and the learning objectives of each course, which can be found in the Appendix. PCORI truly expects to engage an organization that will operate as a partner to analyze needs; recommend a curricula development strategy; propose innovative learning media that match training needs for each course; submit and adjust course drafts on time; and recommend evaluation programs to keep courses effective and relevant.

To appropriately conform to PCORI's mission and research strategy, it is imperative that the Offeror delineate a plan to formally integrate PCORI staff, stakeholders, and patients in the curriculum development process. PCORI is seeking participation that is both relevant and current. Appropriate compensation terms should be subcontracted and budgeted in the cost proposal.

The curriculum must be designed for audiences with varied backgrounds, occupations, levels of experience, and learning capabilities. Some training courses will target internal learners (PCORI staff and PCORI contractors), while others will target PCORI's external "customers" (applicants for funding, awardees, patients, and stakeholders). Accordingly, all content (and presentation methods) should (1) take into account the variety of trainees present and (2) be clear and readable.

At a minimum, the developed curricula will be CBT and must include complete student and instructor training manuals, presentation materials, and all supporting written materials. Electronic, multimedia, and interactive learning formats are preferred. PCORI retains all rights to all curricula and associated educational materials.

Training Delivery

The Contractor shall provide resources, guidance, and direction on curriculum delivery and shall have the subject matter expertise to build a training program that is logical, impactful, meaningful, and memorable. The project goal is to provide complementary education through CBT/webinars as well as any hands-on training sessions that reinforce CBT/webinar content.

Deliverables

The chosen Contractor(s) shall provide the following deliverables/submittals for each training course. PCORI is seeking a multi-phased curricula development approach. Courses will be prioritized, but development activities will overlap as the project progresses. PCORI expects to discuss, negotiate, and adjust a timeline if the chosen Contractor(s) recommend new priorities or course enhancements that require more development time. The contractor will develop, test, and implement the courses in a staggered sequence during the initial six months of the contract. The sequence of course completion dates will be established during the contract activation period.

PCORI will provide oversight, guidance, and direction, and the Contractor shall work collaboratively with PCORI to design curricula and fulfill the requirements of the solicitation.

<u>Deliverables</u> (required for <i>each</i> of the 12 PCORI courses)
Project Plan to engage PCORI staff, stakeholders, and patients
Project plan to begin curriculum development
Course Outline - Draft #1
Course Outline - Draft #2
Course Outline - Final Draft
Proposed multimedia and innovative learning technologies
Final Draft of multimedia and innovative learning technologies
Continuation/Implementation of PCORI Training Program recommendations
Final Process Improvement Plan

Further, the Contractor shall provide the deliverables and management information reports as related to the overall progress and efficacy of the program and submit to the PCORI Science, Engagement and Contracts Management directorates.

The Contractor must consider electronic methods of communication to minimize or eliminate unnecessary paperwork.

Place of Performance

The Contractor is required to provide the facilities necessary to execute the scope of work. With the exception of the required Program Manager position, the Contractor shall choose its staff or acquire the necessary personnel support and provide suitable work facilities.

Hours of Service

It is expected that the Program Manager (or an agreed upon designee) will 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.

Type of Contract

PCORI expects to issue one or more awards to one or more Contractors. Offerors may choose to submit proposals addressing one or more of the training courses outlined in this RFP. The contract(s) will be Firm Fixed Price and inclusive of all expenditures.

Insurance

The Contractor, at its own expense, shall provide and maintain at least \$1 million of General Liability insurance during the entire period of performance of this contract.

Contractor’s Quality Control and Quality Assurance Surveillance Plan

The Offeror shall describe the procedures to continually monitor the quality of services, with the goal of providing and maintaining the highest level of customer service and satisfaction. These procedures should include:

- An internal method for monitoring, identifying, and correcting deficiencies in the quality of service furnished to PCORI.
- A Quality Service survey form that addresses the services to be furnished under this contract.

The Offeror should describe and outline its procedures to ensure that the program is successfully managed, fully implemented to PCORI’s standards, and able to generate substantive recommendations that are meaningful and quantitative.

The Contractor(s) selected are required to have a Quality Assurance Surveillance Plan (QASP). As part of a performance-based contract, the Contractor(s) will be required to perform at an acceptable level of quality, at a minimum, to continue supporting the project. Should the Contractor(s) be unable to meet the requirements, the contract may be canceled due to unsatisfactory performance. The following quality guidelines will be used to measure Contractor performance. These guidelines are subject to change, if it is in the best interest of PCORI.

Quality Measurement	Quality Level		
	Exceeds	Acceptable	Unacceptable
PCORI staff, Stakeholder and Patient Involvement	Staff, stakeholders, and patients are formally subcontracted, compensated, and involved in the curriculum research process.	Relevant and current surveys/studies are consulted and integrated to provide meaningful contributions to the curriculum research process.	Staff, stakeholders, and patients are not formally consulted or engaged during the development of curriculum.
Curricula Development	Curriculum is designed specific to PCORI’s research goals with state-of-the-art strategies, methodologies, examples,	Curriculum is a proven program—customized to PCORI’s research goals.	Curriculum is generic and not specific to PCORI’s research goals.

	and content.		
Training Delivery	Training uses best practices and aligns with PCORI's research goals. CBT is innovative and interactive. The webinars are state-of-the-art and clear. Hands-on delivery is comprehensive, reinforcing, and interactive.	Training is comprehensive and in alignment with PCORI's research goals.	The courses do not reflect PCORI's research goals and learning objectives, delivery methods are not conducive to stakeholder needs, and little/no opportunity for interaction is provided.
Evaluation Protocol	Provides a customized evaluation system to evaluate both current and future training projects. The multifaceted system evaluates the project lifecycle: from identification of learner audiences through training and ultimate effectiveness during PCORI operations.	Provides recommendations based on comprehensive evaluation protocols. Presents an evaluation system to accurately gauge student competency and effectiveness.	No evaluation protocol and system to accurately gauge program effectiveness provided.
Process Improvement Plan	Provides a comprehensive plan that mandates regular interface with PCORI; provides innovative technology enablers; and ensures that the resultant curricula are meeting PCORI's training needs.	Provides a plan that identifies shortcomings of the current process and curriculum, along with recommended improvements.	The Contractor does not provide a formalized Process Improvement Plan.

Compliance

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

Onsite Support

No onsite support is required to execute the Scope of Work. However, it is expected that the Contractor will identify a Program Manager who will serve as a liaison to PCORI. The PM shall be available to provide regular project status updates, answer questions from PCORI, and serve as the single point of contact for the Contractor. This level of interaction and support could include regular onsite meetings with PCORI staffs, but it is not mandatory. PCORI will provide reciprocal access to its Science, Engagement, and Contracts Management Program Directorates with a dedicated PCORI staffer for every course.

Furnishing of Equipment/Property

The Contractor(s) shall provide all of the necessary equipment and work facilities related to its project team.

The Contractor(s) or its subcontractors shall provide the equipment and supplies associated with curricula development. This includes all costs and fees associated with CBT, multimedia, and software licensing.

Period of Performance

The period of performance is approximately six months (June–December, 2013), with an option for a total engagement of up to one year. The anticipated contract award date is approximately May 31, 2013.

Non-Disclosure Agreements (NDA)

The Contractor(s) 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 an NDA.

Organizational Conflict of Interest (OCOI)

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.

Step 3: Develop Your Solution



Overview—Proposal Content

Proposal Content

Your proposal should be organized into two separate volumes: Volume I is a Technical Proposal to include the Technical Solution, Management Approach, and Past Performance and Volume II to include the Cost Proposal. It is recommended that the two proposals be submitted as separate files.

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.

- **Technical Solution.** The Offeror shall demonstrate and describe the proposed solution based on the requirements in the scope of work.
- **Management Approach.** The Offeror shall demonstrate that it has the ability to manage and control the operation to ensure successful program support, including subjects such as the program management, financial resources or ability to obtain them, equipment and facilities, quality assurance approach, internal controls, and staffing.
 - Key personnel resumes should be no longer than two pages and are not included in the page count.
 - For large businesses with approved subcontracting plans already in place, a Subcontracting Plan must be submitted (if the Cost Proposal includes subcontracts) to include socioeconomic subcontractors, such as small, small disadvantaged, small disabled veteran owned, veteran owned small business, woman owned small business, or Historically Underutilized Business Zones (HUBZone) interests.
- **Past Performance.** The Offeror shall identify up to three previous or existing clients within the last five years with a similar effort in the nonprofit, commercial or federal market. Include client name, period (dates) of performance, and a synopsis of work performed.

The Offeror shall propose a labor mix to adequately fulfill the requirement of the solicitation in their response. Furthermore, the Offeror shall provide a sufficient level of detail to support the proposed mix and provide documentation, as necessary, to substantiate the value.

A Cost Proposal should be distinct and separate from the aforementioned narrative. Given that the award is expected to be a Firm Fixed Price contract, all costs and fees should be



included. If needed, a brief budget narrative (no more than two pages) may be included to clarify unusual budget items or calculations. The proposed budget should include the organization's regular, approved salary and fringe rates. Any and all indirect fees must be fully supported with applicable documentation (eg, copies of federally-negotiated indirect cost rate agreements) and are subject to verification and audit. The Cost Proposal does not count toward the page count limitation. Nevertheless, this section should also conform to PCORI's formatting requirements, as noted below in Section 5.

Step 4: Know the Review Criteria



Overview—Review Criteria

An award will be made to the Offeror who proposes the best value with the technical solution being more important than the management approach, past performance, and price, as determined by the scope of work outlined in the previous sections and the following evaluation factors, and as indicated in the matrix below.

PCORI reserves the right to reject proposals that are unreasonably low or high in price. Price will be evaluated for cost realism. The price will be determined with regard to the fulfillment of the requirements based on Section 1. PCORI will determine the Offeror’s acceptability by assessing the Offeror’s compliance with the terms of the RFP.

Matrix

Transaction Description	Weight of Rating Factor
Technical Proposal	35%
Management Approach	25%
Past Performance	30%
Cost Proposal	10%

Evaluation Categories

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 probability of success in this services-based effort.

Best and Final Offers

If subsequent to receiving original proposals, PCORI reserves the right to notify all technically acceptable Offerors within the competitive range and to provide them an opportunity to submit written best and final offers at the designated date and time. Best and



Final Offers (BAFO) shall be subject to the Late Submissions, Late Modifications, and Late Withdrawals of Proposals provision of the solicitation. After receipt of BAFO, no discussions shall be reopened unless PCORI determines that it is clearly in PCORI's best interest to do so (eg, 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 Offerors still within the competitive range.

At its discretion, PCORI reserves the right to also invite Offerors who are technically acceptable to conduct 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.

Protests

Any actual or prospective Offeror, or 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 St., NW, Suite 900
Washington, DC 20036

Step 5: Submit Your Proposal



Overview—Summary of Instructions

Each proposal submitted must conform to the following instructions.

Format

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 are acceptable; MS Word, MS Excel, or Adobe PDF formats.

Cover Letter

The cover letter must contain the following information:

- Offeror's name and mailing address
- Reference to the solicitation (RFP) number (PCO-TRNG2013)
- Technical and contract points of contact—name, phone number, and e-mail address
- Business size (Large, Small, State/Federal Certifications—MBE, 8(a), HUBZone, and the like)
- 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

Proposal

Ensure that your proposal contains the requisite two volumes (please refer to Section 3 that describes Volume I to include Technical Solution, Management Approach and Past Performance and Volume II to include Cost Proposal), conforms to the format and content instructions, and addresses the Scope of Work and all deliverables.

Submission Deadlines

- Questions should be addressed and submitted to rfp@pcori.org, referencing the RFP number in the subject line, NO LATER THAN 5 p.m. (Eastern Time) April 26, 2013.
- Closing date—All proposals should be sent NO LATER THAN 5 p.m. (Eastern Time) May 17, 2013, to rfp@pcori.org with the RFP number clearly listed in the subject line.
- Anticipated notice of award date: May 31, 2013.

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 and retained by PCORI, and therefore shall not be returned to the Offerors.

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, but not later than the closing date and time for receipt of proposals.

About PCORI

The Patient-Centered Outcomes Research Institute (PCORI) is an independent organization created to help people make informed health care decisions and improve health care delivery. PCORI will commission research that is guided by patients, caregivers, and the broader health care community and will produce high integrity, evidence-based information.

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

Our Mission

PCORI helps people make informed health care decisions and improves health care delivery and outcomes by producing and promoting high integrity, evidence-based information that comes from research guided by patients, caregivers, and the broader health care community.

Our History

PCORI was created by the Patient Protection and Affordable Care Act of 2010 as a non-profit, nongovernmental organization. PCORI's purpose, as defined by the law, is to help 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."

The statutory language defining PCORI is broad and authorizes research that will support a strong patient-centered orientation, inform better choices among alternative treatment and prevention strategies, and direct attention to individual and system differences that may influence strategies and outcomes. PCORI was designed to produce knowledge through the analysis and synthesis of existing research or the support of new research.

Appendix

PCORI 101

Background: PCORI 101 will serve as the introductory course to all of PCORI’s training curricula. The course will be sufficient for providing history about the organization, its mission, and its operations. It should provide a brief overview of each department of the organization, and that department’s work. The course can also serve as a way to inform the general public about why and how to get involved in PCORI’s work, and provide a clear call to action.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area?
 - i. one course, four sections
- b. What are the defined learning modules within each course (headings only)?
 - i. Who We Are, Research Done Differently, How We Do It, Call to Action/Get Involved
- c. Course length/contact hours?
 - i. 13 minutes- content only
 - ii. 25 minutes- content and assessments
- d. Course objectives?
 - i. Understand PCORI’s history, funding sources; patient-centeredness; patient-centered outcomes research and clinical comparative-effectiveness research (CER); how applications are solicited, submitted, reviewed and selected; PCORI governance
 - ii. Know how a patient or stakeholder can become involved with PCORI’s work, apart from applying for funding
 - iii. Collaboration and communication across divergent perspectives in research
- e. Critical learning elements?
 - i. Easy-to-understand overview of the organization, its functions, and deliver a call to action relevant to any member of the public.
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)?
 - i. No

2. Staff

- a. In your estimation, how many curriculum development staff members would the Contractor need in order to complete your course(s) in the prescribed timeframe?
 - i. One technical writer, an animator, and a project manager

3. Skills

- a. What are the prerequisites of your target audience? Minimum educational levels?
 - i. Prerequisites: interest in PCORI; should not have to be experienced with PCORI in order to understand and fully benefit from the curriculum
 - ii. Minimum education level: high school

- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)?
 - i. Adult learning/training experience
- 4. **Delivery**
 - a. What is the prescribed curriculum format?
 - i. Web-based/computer-based - primary
 - ii. Trifold - secondary
 - b. What deliverables should be required of the Contractor?
 - i. Script revisions development plan
 - ii. Assessment module questions
 - iii. Updated animation storyboards/demo
- 5. **Timelines**
 - a. Define the project timeline
 - i. *What is the "best case" course delivery date?* June 2013
 - ii. *What is the "No Later Than" course delivery date?* July 2013
 - b. What frequency of interaction with your staff will be required of the contractor?
 - i. Regular (at least, biweekly) updates; when animation/software is being developed, visuals should be shared, and in-person meetings would be preferred.

PCORI Scientific Advisory Panels

Background: One of the ways PCORI seeks to bring voices from across the health care community into our work is through PCORI Advisory Panels. According to our authorizing legislation, advisory panels must include representatives of practicing and research clinicians, patients, and experts in scientific and health services research, health services delivery, and evidence-based medicine who have experience in the relevant topic and, as appropriate, experts in integrative health and primary prevention strategies. Appropriate experts from industry may be represented as well.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? 1
- b. What are the defined learning modules within each course (headings only)?
 - i. TBD, based on the course objectives
- c. Course length/contact hours? 2 hours
- d. Course objectives? Understanding the PCORI AP process and how to navigate supporting software systems. Collaboration and communication across divergent perspectives in research. Formulation and processing of briefs. How to apply the five ranking criteria; Transparency—especially during dissemination; and how their final prioritized list of topics will be used.
- e. Critical learning elements? Understanding the Advisory Panel Process, Effective Communication and Reporting
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD

2. Staff

- a. PCORI department: PCORI Science team

3. Skills

- a. What are the prerequisites of your target audience? Minimum educational levels? TBD
- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)? TBD

4. Delivery

- a. What is the prescribed curriculum format?
 - i. Text curriculum and computer-based training (CBT), as a minimum.
- b. What deliverables should be required of the Contractor? TBD

5. Timelines

- a. Define the project timeline
 - i. What is the “best case” course delivery date? June 2013
 - ii. What is the “No Later Than” course delivery date? July 2013
- b. What frequency of interaction with your staff will be required of the contractor? Weekly

PCORI Merit Reviewer (Researcher and non-researcher)

Background: The Patient-Centered Outcomes Research Institute (PCORI) is seeking scientists, patients, caregivers, clinicians, and other stakeholders to review funding applications for research intended to help patients and those who care for them make better-informed health care decisions. Reviewers are highly valued members of the PCORI community whose work is essential to helping us support research that will be scientifically rigorous and truly patient-centered.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? 1 course, 5 modules
- b. What are the defined learning modules within each course (headings only)?
 - i. What the PFA contains
 - ii. Understanding the Review Criteria and how to apply them
 - iii. How to summarize applications and prepare for discussions at the review
 - iv. Patient reviewer role (assigning criteria 2, 4 and 7)
- c. Course length/contact hours? TBD
- d. Course objectives?
 - i. Those who complete the course will have a better understanding of
 - What the PFA contains
 - How the applications were screened by PCORI staff
 - What the review criteria are and how to apply them
 - How to assign overall scores
 - How to write a one-paragraph synopsis of the application
 - How to discuss applications verbally for the review session
 - What happens to the applications after they are scored
 - The methodology standards and how applications must adhere to them
 - For patient reviewers specifically, how to apply criteria 2, 4, and 7
 - Collaboration and communication across divergent perspectives in research.
- e. Critical learning elements?
 - i. How to review and score a PFA
 - ii. How PCORI staff prescreen PFAs
 - iii. The role of Merit Reviewers in PCORI's overall prioritization, scoring, and funding processes
 - iv. What happens to PFAs after they are scored
 - v. PCORI's methodology standards and how PFAs adhere to them
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD

2. Staff

- a. PCORI department: Contracts Management

3. Skills

- a. What are the prerequisites of your target audience? Some reviewers are non-scientific/patients and others are research scientists

- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)? TBD
- 4. **Delivery**
 - a. What is the prescribed curriculum format?
 - i. Text curriculum and computer-based training (CBT), as a minimum.
 - b. What deliverables should be required of the Contractor? TBD
- 5. **Timelines**
 - a. Define the project timeline
 - i. What is the "best case" course delivery date? Cycle 1 - August 2013
 - ii. What is the "No Later Than" course delivery date? November 2013
 - b. What frequency of interaction with your staff will be required of the contractor? Weekly

PCORI Applicants for Research Contracts

Background: Applicants for PCORI’s research contracts can include consortia consisting of researchers, patients and a range of stakeholders that includes clinicians, administrators of health care provider organizations, and manufacturers of drugs and medical devices. The nature of comparative patient-centered outcomes research:

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? 1
- b. What are the defined learning modules within each course (headings only)?
TBD
- c. Course length/contact hours? TBD
- d. Course objectives?
 - i. The course for applicants must provide a clear description of:
 - The nature of comparative patient-centered outcomes research
 - PCORI’s expectations for the engagement of patients and stakeholders in the entire research process
 - PCORI’s methodological standards
 - PCORI’s requirement that applications be understandable by researchers, patients and stakeholders
 - PCORI’s process for performing merit review of applications
 - The meaning of each of PCORI’s review criteria
 - The process by which PCORI manages its contracts.
 - Collaboration and communication across divergent perspectives in research
- e. Critical learning elements? RFI, RFQ, RFP review and requirements
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD

2. Staff

- a. PCORI department: Contracts Management

3. Skills

- a. What are the prerequisites of your target audience? Minimum educational levels? TBD
- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)? TBD

4. Delivery

- a. What is the prescribed curriculum format?
 - i. Text curriculum and computer-based training (CBT), as a minimum.
- b. What deliverables should be required of the Contractor? TBD

5. Timelines

- a. Define the project timeline
 - i. What is the “best case” course delivery date? July 2013
 - ii. What is the “No Later Than” course delivery date? August 2013
- b. What frequency of interaction with your staff will be required of the contractor? Weekly

PCORI Awardees of Research Contracts

Background: Organizations that are awarded PCORI research contracts can include consortia consisting of researchers, patients and a range of stakeholders that includes clinicians, administrators of health care provider organizations, and manufacturers of drugs and medical devices.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? 1
- b. What are the defined learning modules within each course (headings only)?
TBD, based on the course objectives and learning elements
- c. Course length/contact hours? 1 hour
- d. Course objectives? A thorough understanding of the expectations and requirements of the PCORI PFA recipients
- e. Critical learning elements?
 - i. How to activate a PCORI contract
 - ii. The common requirements of PCORI contracts
 - iii. How to involve patients and stakeholders in the entire research process
 - iv. How to interact with PCORI's contracts officers and program officers.
 - v. How to involve relevant stakeholders in all phases of their research.
 - vi. How attainment of milestones is linked to payments.
 - vii. How to negotiate and activate a PCORI contract
 - viii. How to prepare, present and disseminate your results
 - ix. Requirement to share data
 - x. Active portfolio management
 - xi. Contracts versus Grants: Need for deliverables and milestones
 - xii. Collaboration and communication across divergent perspectives in research
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD

2. Staff

- a. PCORI department: Science Team/Contracts Management

3. Skills

- a. What are the prerequisites of your target audience? Minimum educational levels? TBD
- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)? TBD

4. Delivery

- a. What is the prescribed curriculum format?
 - i. Text curriculum and computer-based training (CBT), as a minimum.
- b. What deliverables should be required of the Contractor? TBD

5. Timelines

- a. Define the project timeline
 - i. What is the "best case" course delivery date? June 2013
 - ii. What is the "No Later Than" course delivery date? October 31, 2013



- b. What frequency of interaction with your staff will be required of the contractor? Weekly

PCORI Program Officers

Background: PCORI program officers are scientists with doctoral degrees (PhDs and/or MDs) who manage the scientific aspects of PCORI's research contracts in collaboration with the awardees.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? (2) 4-hour courses
- b. What are the defined learning modules within each course (headings only)?
Evaluate PCORI programs; understanding research needs; establish realistic milestones and deliverables; effectively managing research and awardees; collecting and synthesizing deliverables; and dissemination of results.
- c. Course length/contact hours? 4 hours
- d. Course objectives? The course for program officers must provide a clear description of:
 - i. How to create risk-based plans for managing PCORI research contracts
 - ii. How to evaluate awardees' progress toward the attainment of their scientific and engagement milestones
 - iii. How to assist awardees in reaching their project milestones and disseminating their findings.
 - iv. How to devise a management plan according to risk level.
 - v. Collaboration and communication across divergent perspectives in research
- e. Critical learning elements?
 - i. Funding 101; Evaluation: Scientific Milestones, Awardees in Engagement attaining milestones; Evaluating Management Plan according to level of risk, Building a Portfolio, and Standard Operating Procedures (SOP)Core Materials
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD

2. Staff

- a. PCORI department: PCORI Science Team

3. Skills

- a. What are the prerequisites of your target audience? Minimum educational levels? Small group delivery skills
- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)? Program Funding Officer/Contracting Management

4. Delivery

- a. What is the prescribed curriculum format?
 - i. Text curriculum and CBT, as a minimum.
- b. What deliverables should be required of the Contractor? TBD

5. Timelines

- a. Define the project timeline
 - i. *What is the “best case” course delivery date?* July 15, 2013
 - ii. *What is the “No Later Than” course delivery date?* October 7, 2013
- b. What frequency of interaction with your staff will be required of the contractor? Weekly

PCORI Chairs of Advisory and Review panels

Background: PCORI relies heavily on two types of multiperspective panels to accomplish its mission: advisory panels and merit review panels. Each panel includes numerous patients, stakeholders, and researchers who discuss, debate, and rank research topics (in the case of advisory panels) and applications (in the case of review panels)—then they recommend which of the options PCORI’s Board of Governors should consider supporting. The chairs of these panels are responsible for facilitating the rich conversations that occur when these diverse panels meet to do their work, usually for one full day about three times each year.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? TBD
- b. What are the defined learning modules within each course (headings only)?
TBD
- c. Course length/contact hours? 2 hours
- d. Course objectives? This course must prepare the chairs of PCORI’s advisory panels (4-6 chairs each year) and merit review panels (10-20 per year) to:
 - i. Facilitate diverse panelists’ discussions despite their differing backgrounds, professions, and patterns of speaking and thinking.
 - ii. Foster mutual respect and equity among the panelists.
 - iii. The chairs must also know and be able to explain to the panelists PCORI’s statutory requirements to fund only studies of comparative effectiveness and to not fund studies of cost-effectiveness.
 - iv. Collaboration and communication across divergent perspectives in research
- e. Critical learning elements? TBD
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD

2. Staff

- a. PCORI department: PCORI Chief Scientific Officer

3. Skills

- a. What are the prerequisites of your target audience? Minimum educational levels?
 - i. Prerequisite: PCORI 101
- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)? TBD

4. Delivery

- a. What is the prescribed curriculum format?
 - i. Computer-based training (CBT) to the greatest extent that is consistent with high-quality education
- b. What deliverables should be required of the Contractor? TBD

5. Timelines

- a. Define the project timeline
 - i. Option 1. The contractor will develop, test and implement this course in a staggered sequence with the other contracted courses during the initial six months of the contract. The sequence of course



completion dates will be established during the contract activation period.

ii. Option 2.

- What is the "best case" course delivery date? July 2013
- What is the "No Later Than" course delivery date? September 2013

b. What frequency of interaction with your staff will be required of the contractor? Weekly

Training RFP Questions: PCORI Ambassadors

Background: The PCORI Ambassador Program will serve as a multi-directional information exchange platform to build an authentic patient-centered outcomes research (PCOR) community with special focus on the underserved populations, as well as those who experience disparate health and health care. Ambassadors will serve as an informed “boots on the ground,” complement to PCORI’s awareness raising, research outreach (ie, to identify priorities, patient/stakeholder (PFA) partners, recruitment of participants in research, and the like) and as a valuable resource and conduit for evaluations, surveys, feedback and dissemination. Ambassadors will also serve as a rich pool of PCOR supporters for recruitment of panelists, presenters, coauthors and patient/stakeholder spokespeople for PCORI events as well as for others.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? 1
- b. What are the defined learning modules within each course (headings only)?
Approx. 4
 - i. PCORI 101
 - ii. Who are PCORI Ambassadors?
 - iii. Media Tips
 - iv. How to apply for PCORI funding? (As PCORI Ambassador)
- c. Course length/contact hours? 1 hour (webinar)
- d. Course objectives?
 - PCORI 101
 - i. In addition to the “Guiding Document: Enhanced Curriculum for PCORI 101”
 - ii. Can we include a FAQs sheet to include questions such as: How PCORI is funded? Why we fund contracts and not grants? Why don’t we do cost-effectiveness research?
 - Who are PCORI Ambassadors?
 - i. Roles, expectations
 - Media Tips
 - i. Public Speaking: Story Polishing
 - ii. Social Media Tools (ie, Yammer)
 - iii. Know your Toolkit
 - iv. Contacting your local media and policy makers
 - How to apply for PCORI funding? (As PCORI Ambassador)
 - i. Engagement Awards
 - Collaboration and communication across divergent perspectives in research
- e. Critical learning elements?
 - i. Good orientation with PCORI, knowing their expectations.
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD

2. Staff

- a. Subject Matter Expert: Community Engagement

3. Skills

- a. What are the prerequisites of your target audience? Minimum educational levels?
 - i. An interest in community engagement. High school education.
- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)?
 - i. Models of Community Engagement, public speaking, social media and translation of toolkit materials into **Spanish**, graphic design

4. Delivery

- a. What is the prescribed curriculum format?
 - i. Textbook, tri-fold, multimedia, independent online/web-based training, instructor-led training, and so forth
 - ii. Webinar, toolkit, handbook and archived digitally for later reference
- b. What deliverables should be required of the Contractor?
 - i. Development plan/course outline
 - ii. Research/stakeholder engagement plan
 - iii. Drafts
 - iv. Draft and course outline

5. Timelines

- a. Define the project timeline
 - i. *What is the “best case” course delivery date?* June 2013
 - ii. *What is the “No Later Than” course delivery date?* August 2013
- b. What frequency of interaction with your staff will be required of the contractor?
 - i. Weekly, with frequent email communications

PCORI Engagement Award - Applicants

Background: Engagement Awards enable consumer/patient organizations and health care professionals and organizations to take a more active, informed role in partnering with researchers in the design and conduct of research and in identifying important research priorities and questions. The Engagement Awards will help build a meaningful, sustainable research partnership infrastructure for patient-centered outcomes research (PCOR) as well as facilitate successful proposal submissions.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? 1
- b. What are the defined learning modules within each course (headings only)?
 - i. What a Pilot Engagement Award is and how it differs from a traditional PCORI funding award
 - ii. The three tiers of the Pilot Engagement Award structure
 - iii. Process(es) for submitting an application and eligibility requirements
- c. Course length/contact hours? 1 hour
- d. Course objectives?
 - i. Upon completion of the course, applicants will know
 - Dates for submission and materials required for submission (LOI, application, and so forth)
 - Outline of Engagement Award path from Tier 1 up to Tier 3 and distinction between the three types of awards
 - Postaward requirements, particularly communication and dissemination of findings/best practices early and often
 - Review criteria for Engagement Award selection
 - What IRB approval is and when it may be required
 - Budget parameters
- e. Critical learning elements?
 - i. Purpose of the Engagement Awards within PCORI's funding portfolio (what we're hoping to accomplish by funding these projects)
 - ii. How building community with patients, stakeholders, and researchers can lead to multiple patient-centered outcomes research opportunities with and outside of PCORI
 - iii. How to successfully apply for an Engagement Award
 - iv. Collaboration and communication across divergent perspectives in research
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD

2. Staff

- a. PCORI department: Engagement

3. Skills

- a. What are the prerequisites of your target audience? Minimum educational levels? TBD

- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)? TBD
- 4. **Delivery**
 - a. What is the prescribed curriculum format?
 - i. Text curriculum and computer-based training (CBT), as a minimum.
 - b. What deliverables should be required of the Contractor? TBD
- 5. **Timelines**
 - a. Define the project timeline
 - ii. What is the "best case" course delivery date? July 2013
 - iii. What is the "No Later Than" course delivery date? September 2013
 - b. What frequency of interaction with your staff will be required of the contractor? Weekly

PCORI Engagement Award - Awardees

Background: Engagement Awards enable consumer/patient organizations and health care professionals and organizations to take a more active, informed role in partnering with researchers in the design and conduct of research and in identifying important research priorities and questions. The Engagement Awards will help build a meaningful, sustainable research partnership infrastructure for patient-centered outcomes research (PCOR) as well as facilitate successful proposal submissions. Engagement Award Awardees will learn about PCORI's patient engagement methods, the three tiers of the Engagement Award construct, and how successful Engagement Award projects can lead to larger PCOR efforts.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? 1 course per tier – 3 tiers
- b. What are the defined learning modules within each course (headings only)?
 - i. How patients and stakeholders need to be engaged in all phases of work
 - ii. How to communicate and work with PCORI and subgranting entities to manage the Award
 - iii. How success for a Tier 1 Award is measured (same concept for Tier 2 training, and Tier 3 training)
- c. Course length/contact hours? 2-hour/6 hours
- d. Course objectives?
 - i. Upon completion of the course, Awardees will know
 - The differences between Tier 1, 2 and 3 Awards and how to successfully progress from one to the next
 - How building communities of patients, stakeholders, and researchers can lead to successful PCOR
 - How to work with the PCORI and/or subgrantor's contracts department and program officer(s)
 - How milestones are linked to payments
 - How to disseminate results and freely share data/lessons learned
- e. Critical learning elements?
 - i. The pathway from Tier 1 to Tier 3 and then on to PCORI or other funding opportunities
 - ii. The importance of patient and stakeholder engagement in every aspect of research
 - iii. (For Tier 2 awardees) the goal of the second level of funding is to begin coalescing the patient/stakeholder/researcher community around specific health/research issues
 - iv. (For Tier 3 Awardees) the goal of the third level of funding is to begin to orient around and build a solid research proposal for PCORI or other funders interested in PCOR.

- v. Collaboration and communication across divergent perspectives in research
 - f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD
- 1. Staff**
- a. PCORI department: Engagement
- 2. Skills**
- a. What are the prerequisites of your target audience? Minimum educational levels? TBD
 - b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)? TBD
- 3. Delivery**
- a. What is the prescribed curriculum format?
 - i. Text curriculum and computer-based training (CBT), as a minimum.
 - b. What deliverables should be required of the Contractor? TBD
- 4. Timelines**
- a. Define the project timeline
 - i. What is the “best case” course delivery date? July 2013
 - ii. What is the “No Later Than” course delivery date? September 2013
 - b. What frequency of interaction with your staff will be required of the contractor?
Weekly

PCORI Patient Engagement Advisory Panels

Background: The Advisory Panel on Patient Engagement will serve as a quality assurance mechanism to ensure that patient-centeredness remains at the core of PCORI's work and the research that we fund. The Patient Engagement Panel will inform our work by reviewing and advising PCORI on our strategies for engaging patients in every step of the research continuum, current and future programs aimed at inviting and harnessing the patient voice in the research that we fund, and methods to evaluate the impact of patient engagement in research. Patient Engagement Advisory Panel members will learn about PCORI's research prioritization, funding, engagement, and communication and dissemination processes and develop methods for advising us across these areas.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? 1
- b. What are the defined learning modules within each course (headings only)?
 - i. The function of PCORI's (science) Advisory Panels
 - ii. How the Patient Engagement Advisory Panel will operate in conjunction with the Science Advisory Panels
 - iii. The Patient Engagement Advisory Panel's role in providing guidance to PCORI across all of our patient engagement work.
- c. Course length/contact hours? 4-hour
- d. Course objectives?
 - i. Upon completion of the course, panel members will be able to
 - Advise on processes to identify research topics and priorities that are important to patients;
 - Advise on all aspects of stakeholder review of applications for PCORI funding;
 - Provide general recommendations to PCORI and externally on the conduct of patient-centered research;
 - Advise on methods to evaluate the impact of patient engagement in research;
 - Assist and advise PCORI on communications, outreach, and dissemination of research findings; and
 - Provide advice on other questions and areas of interest that may arise relevant to PCORI's mission and work.
- e. Critical learning elements?
 - i. Familiarity with PCORI's mission, national priorities, and the purpose and function of the Advisory Panels
 - ii. Knowledge of all of PCORI's patient and stakeholder engagement opportunities
 - iii. Understanding of PCORI's research prioritization process
 - iv. Comprehension of the panel's purpose and function, culminating in the panels' creation of its operating charge and scope of work
 - v. Collaboration and communication across divergent perspectives in research
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD

2. Staff

- a. PCORI Department: Patient Engagement

3. Skills

- a. What are the prerequisites of your target audience? Minimum educational levels? TBD
- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)? TBD

4. Delivery

- a. What is the prescribed curriculum format?
 - i. Text curriculum and computer-based training (CBT), as a minimum.
- b. What deliverables should be required of the Contractor? TBD

5. Timelines

- a. Define the project timeline
 - i. *What is the "best case" course delivery date?* July 2013
 - ii. *What is the "No later than" course delivery date?* September 2013
- b. What frequency of interaction with your staff will be required of the contractor? Weekly

PCORI Patient and Stakeholder Evaluators

Background: The PCORI Engagement Team is issuing this Request for Proposals (RFP) for curriculum development and delivery. This curriculum will be to train the growing “PCOR community”—those individuals who will serve as merit reviewers, participants in PCORI Ambassador programs, advisory panels, micro-contract awardees and recipients of proposal funding in the conduct of research, including patients, stakeholders, and researchers. Training may also include how to fill out a proposal and apply for funding. Use these examples as a guide, but please feel free to propose new ideas. Our aim is to have a set of training materials which will be applicable and customizable for each team’s specific tasks and activities.

1. Scope of Work/Breadth of Training

- a. How many courses are needed per topic area? 1
- b. What are the defined learning modules within each course (headings only)?
TBD
- c. Course length/contact hours? 1 hour
- d. Course objectives?
 - i. Familiarity with PCORI’s mission, national priorities, and the purpose and function of the advisory panels.
 - ii. To provide recommendations for critical metrics of success for PCORI workshops and other functions.
 - iii. Identify elements of successful engagement in research.
 - iv. Compare PCORI awardee engagement activities against those elements to assist with evaluating the quality of research engagement.
 - v. Operation in conjunction with the Science Advisory Panels.
 - vi. Provide guidance to PCORI across all of our patient engagement work.
 - vii. Knowledge of all PCORI patient and stakeholder engagement opportunities.
 - viii. Comprehension of the panel’s purpose and function, culminating in the panels’ creation of its operating charge and scope of work.
- e. Critical learning elements?
 - i. How to guide evaluation plans for workshops and obtain patient/other stakeholder input on ongoing evaluation of engagement in research by PCORI awardees.
 - ii. Knowledge of PCORI’s (science) Advisory Panels functions
 - iii. Understanding of PCORI research prioritization process
 - iv. Collaboration and communication across divergent perspectives in research
- f. Are different versions needed to address different audiences (PCORI-internal vs. external stakeholders)? TBD

2. Staff

- a. PCORI department: Engagement Research Team

3. Skills

- a. What are the prerequisites of your target audience? Minimum educational levels? TBD
- b. What type and level of Subject Matter Expertise will be needed to effectively develop your course(s)? TBD

4. Delivery

- a. What is the prescribed curriculum format?
 - i. Text curriculum and compute- based training (CBT), as a minimum.
- b. What deliverables should be required of the Contractor? TBD

5. Timelines

- a. Define the project timeline
 - i. What is the “best case” course delivery date? June 2013
 - ii. What is the “No Later Than” course delivery date? January 2014
- b. What frequency of interaction with your staff will be required of the contractor? Weekly