Patient-Centered Outcomes Research
REQUEST FOR QUOTE
FOR
E-Learning Training and Content Development Services

September 22, 2020

<table>
<thead>
<tr>
<th>KEY DATES</th>
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</thead>
<tbody>
<tr>
<td>Request for Proposal Released</td>
<td>September 22, 2020</td>
</tr>
<tr>
<td>Deadline for Questions</td>
<td>September 29, 2020</td>
</tr>
<tr>
<td>Deadline for Proposal</td>
<td>October 13, 2020</td>
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<tr>
<td>Projected Award Date</td>
<td>October 22, 2020</td>
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<tr>
<td>Projected Start Date</td>
<td>October 26, 2020</td>
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About PCORI

In 2010, Congress authorized the establishment of PCORI as an independent nonprofit organization incorporated in the District of Columbia. The authorizing law establishes PCORI’s purpose, significant parts of its governance structure (including the appointment of PCORI’s Board of Governors and Methodology Committee) and outlines key responsibilities and requirements of PCORI. The authorizing law was amended in legislation that was signed into law on December 20, 2019. PCORI is charged with helping patients, clinicians, purchasers, and policy makers make better-informed health decisions by “advancing the quality and relevance of evidence about how to prevent, diagnose, treat, monitor, and manage diseases, disorders, and other health conditions.” It does this by funding research guided by patients, caregivers, and the broader healthcare community, which results in high-integrity, evidence-based information.

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

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

Background

PCORI’s Procurement Department manages the business function that ensures identification, access, and management of the external resources that PCORI needs or may need to fulfill its strategic goals and objectives. Procurement encompasses the overarching function around the acquisition of goods and services for use by PCORI. Procurement can include planning, standards development/determination, preparation of quotes/proposals, selection of contractors, contractor management, and other related functions.

The Procurement Department’s principal responsibility is to provide functional direction and control of all processes and operations governing procurements, which include:

- managing all procurement-related activities at PCORI;
- issuing and interpreting procurement policies, procedures, and guidance, as needed;
- providing procurement support services to PCORI’s departments; and
- providing pre-award and post-award management support.

The Procurement Department supports departmental offices in fulfilling their missions by providing efficient procurement and business solutions through a standardized process with a clear delineation of roles and responsibilities. From market research through closeout, the Procurement Department informs department directors, managers, and their staff of the details of procurement and how best to accomplish the requirement at hand.

After an agreement is fully executed, a PCORI Project Leader (which is similar to a Contracting Officer’s Representative used in the Federal Government) is assigned to monitor and evaluate a contractor’s performance to ensure that the contractor is meeting or exceeding the quality of services, supplies, or deliverables outlined in the agreement. The Project Leader may, on PCORI’s behalf, monitor and inspect
the work of the contractor to ensure that the contractor is in compliance with the agreement’s specifications and other terms and conditions. The Project Leader interprets technical specifications and verifies that the full scope of work is being performed and that PCORI’s best interests are preserved and protected. The Project Leader provides technical guidance to the contractor to ensure that the contractor meets the technical scope and terms of the agreement.

PCORI has between 30-50 Project Leaders, and their specific responsibilities vary, but may include the following:

- Ensure full and complete coordination, cooperation, and communication with the contractor to monitor performance of the agreement, anticipate and resolve difficulties, inspect/accept goods, and ensure satisfactory completion of the agreement.
- Carefully read and understand the terms and conditions of the agreement (including all amendments).
- Carefully monitor and keep Procurement informed about the contractor’s performance of the technical requirements of the agreement.
- Report to Procurement promptly and directly on any suspected procurement fraud, bribery, conflicts of interest, or any other improper conduct on the part of the contractor.

Scope of Work

PCORI seeks to expand and enhance its educational offerings related to procurement and contract management, particularly by developing its Project Leaders through electronic content and learning products. Through this Request for Quote (RFQ), the successful offeror will provide design, development, and delivery of web-based educational (“e-learning”) content for use by PCORI’s Project Leaders responsible for managing vendors, contractors, and consultants.

PCORI expects offerors to possess a knowledge of best practices related to the design and delivery of e-learning. Offerors should also have extensive experience in user-centered and agile design, storyboarding, development of learning objectives, and training-related data analytics. The successful offeror will possess experience in using adult learning principles. PCORI expects the e-learning content to be interactive, engaging (including using learning assessments), and contain videos and animation; they will work with PCORI to modify and upgrade the training if needed.

PCORI expects the successful offeror to develop content based on the following topics:

- Role(s) of the Project Leader
- Monitoring Vendor/Contractor’s Performance
- Project Leader/Vendor/Contractor Relationship

PCORI seeks an offeror who is experienced in using modern e-authoring tools (e.g. Articulate Storyline 360, Articulate Rise 360, Adobe Captivate etc.). Offerors should specify in their responses their preferred authoring tools or standard web technologies, such as HTML5 and JavaScript.

At a minimum, each course module should be self-paced and include:

- Interactive presentations of the concepts through text, animations, audio narration, and video clips
- Interactive examples, exercises, and quizzes throughout the course for conceptual clarity
The successful offeror shall be responsible for delivering all training course modules in conformance with this RFQ.

**Statement of Objectives**

The Contractor will provide support for course design, development, deployment, operation, and maintenance of customized courses; they will supply all necessary resources to accomplish agreement deliverables, which include the following:

- Designing and delivering three (3) online format training courses/workshops of approximately 20-30 minutes in length each. These courses will assist Project Leaders in better understanding their roles and responsibilities.
- Ensuring that all training and content products produced for PCORI are SCORM and Section 508 compliant.
- PCORI currently uses Litmos as its organizational learning management system (LMS). Ideally, courses will be compatible with and specifically developed, delivered, and launched for use with PCORI’s existing LMS. However, offerors may propose different technological approaches (with pricing) from which PCORI can select or propose a single approach. Such approaches could include, but are not limited to, the following:
  - The Contractor provides free access to a learning management system that PCORI can host, e.g., by providing PCORI with open-source software
  - The Contractor devises a framework under which the courses can be run on PCORI’s existing technology
- Organizing, developing, and working with PCORI through a collaborative process to deliver course materials, including the curriculum, within a specified timeframe and based on PCORI’s training requirements. The Contractor will provide course materials via electronic media and within a specified timeframe.
- Making recommendations on course design including, but not limited to, navigation, structure, use of audio, images, photos, videos, and animation based on current industry and web standards. Any use of images, photos, and video shall depict diversity (race, ethnicity, gender, gender expression, sexual orientation, language, culture, class, religion, mental ability, physical ability, country of origin, and immigration status).
- In the case of new or updated courses, working with PCORI to deliver these courses within a standard timeframe.
- Working with PCORI to allow customized information to be written into the course. The Contractor shall work with PCORI to develop criteria for evaluation of participants’ successful completion of the courses, as well as other learner outcomes, for reporting within specified period.
- (If hosted by the Contractor) Building functionality that allows for the collection and reporting of data that includes, but is not limited to, student completion rates, individual scores, and participation statistics on a schedule to be determined in the PCORI-approved Work Plan.
- Collaborating with PCORI in developing a detailed Work Plan within 30 days of the Agreement Effective Date. The Work Plan shall include tasks and deliverables, deadlines, and milestones for the completion of three (3) courses. The Work Plan shall also include completion dates for system testing and launch. Within five (5) days of receipt of the Work Plan, PCORI will review and provide feedback to the Contractor; the Contractor will provide PCORI with the final PCORI-approved Work Plan within three (3) days after receiving PCORI’s review/comments. Any changes to the PCORI-approved Work Plan, if required, will be coordinated with all parties.
- Working with PCORI to provide a user manual or training that equips appropriate PCORI staff to administer the online course materials and curriculum to ensure smooth operation and execution.
- Providing recommendations for continuous improvement and innovation from the training delivery industry.
- Implementing, measuring, and following processes and best practices for continuous improvement of training content and materials.

**Deliverables Schedule**

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Deliverable Title &amp; Description</th>
<th>Quantity/Media</th>
<th>Planned Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Agenda for Kick Off meeting and other meeting materials</td>
<td>1 electronic copy</td>
<td>1 week before kickoff meeting</td>
</tr>
<tr>
<td>2</td>
<td>Kick Off Meeting</td>
<td>N/A</td>
<td>Approximately one (1) week after the Agreement Effective Date</td>
</tr>
<tr>
<td>3</td>
<td>Submit Draft Work Plan to PCORI</td>
<td>1 electronic document</td>
<td>TBD¹</td>
</tr>
<tr>
<td>4</td>
<td>Submit Final Work Plan to PCORI</td>
<td>1 electronic document</td>
<td>TBD¹</td>
</tr>
<tr>
<td>5</td>
<td>Submit course materials for PCORI’s Review</td>
<td>1 electronic document</td>
<td>TBD¹</td>
</tr>
<tr>
<td>6</td>
<td>Submit final course materials to support each training course</td>
<td>1 electronic document</td>
<td>TBD¹</td>
</tr>
<tr>
<td>7</td>
<td>Delivery of first online training course</td>
<td></td>
<td>January 2021</td>
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¹ Offerors should propose an appropriate date as part of their proposal submissions.
### Deliverables

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<thead>
<tr>
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<th>Quantity/Media</th>
<th>Planned Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>Delivery of second online training course</td>
<td></td>
<td>March 2021</td>
</tr>
<tr>
<td>9</td>
<td>Delivery of third online training course</td>
<td></td>
<td>June 2021</td>
</tr>
<tr>
<td>10</td>
<td>Delivery Course User Training / Manual / Report to PCORI</td>
<td>1 electronic document</td>
<td>TBD²</td>
</tr>
<tr>
<td>11</td>
<td>Submit participant evaluation to PCORI</td>
<td>1 electronic document</td>
<td>TBD²</td>
</tr>
<tr>
<td>12</td>
<td>Submit Course Completion Data Report</td>
<td>1 electronic document</td>
<td>TBD²</td>
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#### Period of Performance

The Period of Performance for this Agreement will be nine (9) months after the Projected Start Date. The deliverables and due dates are listed above. The Projected Start Date is **October 26, 2020**, and questions related to this RFQ should be submitted to rfp@pcori.org.

#### Type of Agreement

PCORI expects to award a **firm fixed price** Agreement. This Agreement type provides an estimate of the work required to be performed over the period of performance. Contractors must be able to perform all activities described in the Agreement.

#### Points of Contact and Responsibilities

A Procurement representative will perform the administration of this Agreement. The Project Leader or designee from PCORI will provide technical assistance in monitoring the Contractor’s performance under this Agreement.

<table>
<thead>
<tr>
<th>Title</th>
<th>Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement Specialist</td>
<td>Rachel Cruse</td>
<td><a href="mailto:rcruse@pcori.org">rcruse@pcori.org</a></td>
</tr>
<tr>
<td>Senior Procurement Manager</td>
<td>Rachel Tran</td>
<td><a href="mailto:rtran@pcori.org">rtran@pcori.org</a></td>
</tr>
<tr>
<td>Director, Procurement</td>
<td>Jason Holloway</td>
<td><a href="mailto:jholloway@pcori.org">jholloway@pcori.org</a></td>
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² Offerors should propose an appropriate date as part of their proposal submissions.
Proposal Instructions

Offerors should submit a proposal, not exceeding 14 pages, detailing the offeror’s approach, capabilities, experience, and any other information with respect to the efforts described herein. Your proposal should also describe the proposed methodology, management, key personnel, staffing, and organizational experience directly relevant to the description/scope of work described herein. More specifically,

- Describe your approach to the scope of this project
- Demonstrate your expertise and experience providing content development, script writing, and training programs
- Demonstrate your expertise and experience designing, developing, and deploying training, content solutions, and process improvements
- Define the roles of all staff involved
- Describe the creative and instructional approach that will be used to engage the learner
- Describe the learning experience and primary interactions
- Describe project management and quality assurance processes
- Provide recommended options that will enhance results or significantly impact costs

Additionally, please feel free to provide any other information to illustrate a thorough understanding of this RFQ.

Questions must be submitted to rfp@pcori.org with “RFQ – E-Learning Training and Content Development Services” in the subject line no later than 5:00 pm Eastern Time on September 29, 2020.

Please submit your response, including a budget, with the reference to “RFQ – E-Learning Training and Content Development Services” to rfp@pcori.org by October 13, 2020. If needed, PCORI will open negotiations to finalize the terms and conditions of this Agreement with your organization.

Evaluation Criteria

The Basis of Award will be Best Value. A firm fixed price agreement will be awarded to the offeror whose proposal, conforming to the RFQ, represents the best value to PCORI. Proposals that are unrealistic in terms of technical or schedule commitments, or unrealistically high or low in terms of price/cost, may be deemed reflective of an inherent lack of technical competence, or indicative of a failure to comprehend the complexity and risks of the proposed work and may be grounds for rejection of the proposal. Cost/Price is not the most important evaluation factor, but its degree of importance will increase commensurate with the degree of equality among different offerors’ proposals.

Proposals will be evaluated using the following criteria:

<table>
<thead>
<tr>
<th>Category</th>
<th>Weight of Rating Factor</th>
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<tbody>
<tr>
<td>Technical Solution</td>
<td>100%</td>
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