Patient-Centered Outcomes Research Institute

TASK ORDER REQUEST FOR PROPOSAL

FOR

Indefinite Delivery/Indefinite Quantity (IDIQ) Analytic and Operational Support for the Engagement of the Public and Patients (AOSEPP)

TORFP # PCO-P2P Evaluation-Task Order # 9

April 9, 2018

<table>
<thead>
<tr>
<th>KEY DATES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Proposal Released</td>
<td>April 9, 2018</td>
</tr>
<tr>
<td>Deadline for Questions</td>
<td>April 16, 2018</td>
</tr>
<tr>
<td>Deadline for Proposals</td>
<td>May 11, 2018</td>
</tr>
<tr>
<td>Projected Award Date</td>
<td>May 30, 2018</td>
</tr>
<tr>
<td>Projected Start Date</td>
<td>June 11, 2018</td>
</tr>
</tbody>
</table>
About PCORI

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

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.
How to Proceed

1. Review the Requirements
   Examine all sections of the RFP and learn about what makes PCORI’s research different. ¹

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

3. Develop Your Proposal
   Develop your response to the requirements within this RFP.

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

5. Submit Your Proposal
   Proposals are due by 5 pm (ET) on May 11, 2018.

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

About PCORI ......................................................................................................................... ii
How to Proceed .................................................................................................................... iii
Background ........................................................................................................................... 1

Deliverables/Delivery Schedule ........................................................................................... 11
  Acceptance of Deliverables ................................................................................................. 15
  Kickoff Meeting .................................................................................................................. 15
  Project Leader’s Authority .................................................................................................. 16
  Period of Performance ......................................................................................................... 17
  Task Orders .......................................................................................................................... 18

Proposal Evaluation Criteria ................................................................................................. 19
  Technical Solution ................................................................................................................ 20
  Project Management Plan ................................................................................................... 20
  Past Performance ................................................................................................................. 21
  Price Proposal ..................................................................................................................... 21
  Award without Communications or Clarifications .............................................................. 22
  Best and Final Offers .......................................................................................................... 22
  Withdrawal or Modification of Proposals ............................................................................ 23
  Late Submissions ................................................................................................................ 23
  Retention of Proposals ....................................................................................................... 23
  Documentation Requirements .............................................................................................. 23
  Basis of Compensation to the Contractor .......................................................................... 23
  Post-Award Debriefing ....................................................................................................... 23

Post-Award Information ......................................................................................................... 24
  PCORI Rights ....................................................................................................................... 24
  Furnishing of Equipment/Property ...................................................................................... 24
  Place of Performance ........................................................................................................... 24
  Hours of Service .................................................................................................................. 24
Insurance.................................................................................................................................................. 24
Non-Disclosure Requirements .............................................................................................................................................. 24
Potential for Organizational Conflicts of Interest and Personal Conflicts of Interest ........................................... 25
Compliance........................................................................................................................................................................ 25
Invoice Content ..................................................................................................................................................................... 25
Billing and Payment Procedures ........................................................................................................................................... 26
Proposal Instructions .................................................................................................................................................................. 27
Appendix A: ................................................................................................................................................................................. 28
Appendix B: Past Performance Questionnaire .............................................................................................................................. 29
Background

The mandate of the Patient-Centered Outcomes Research Institute (PCORI) is to improve the quality and relevance of evidence available to help patients, caregivers, clinicians, employers, insurers, policymakers, and other healthcare stakeholders make informed health decisions. Specifically, PCORI funds comparative clinical effectiveness research, or CER, as well as supports work that will improve the methods used to conduct such studies.

The Pipeline to Proposal Awards program (P2P) was developed as a multi-tiered funding opportunity, with each tier designed to move partnerships within the healthcare community toward the development of high-quality research proposals.

These awards provide seed money to individuals and groups that have healthcare research ideas and interest in patient-centered research. Awardees receive skilled guidance and technical assistance to develop research capacity, create new partnerships, and build the infrastructure needed to conduct research. Ultimately, awardees are expected to submit high-quality research proposals that can be submitted for CER funding from PCORI or other CER funders.

Through this Request for Proposal, PCORI announces its intention to contract for an evaluation of the P2P portfolio to date to monitor the program’s progress toward its goal of increasing the meaningful engagement of patients and other stakeholders in healthcare research. PCORI will contract with one organization that will perform the following tasks:

- Analyze the P2P portfolio to assess work and progress from a process and outcome perspective, including unanticipated benefits derived from awardee and partner program participation.
- Provide standardized, systematic data collection/evaluative measures for continued program assessment.
- Assess patient/stakeholder engagement within and across the portfolio of projects funded by the P2P program.
- Develop a project coding taxonomy to assist in reporting on the P2P portfolio.
- Provide a final summary report describing the overall effort and offering high-level recommendations for concluding the current P2P program and recommendations for reestablishing the program, or a similar initiative, in the future.

Evaluating the P2P program ultimately will enable PCORI to monitor the program’s progress toward its goal of increasing the meaningful engagement of patients and other stakeholders in healthcare research. It also will inform process improvement for the program, track the success of funded projects, and measure the overall impact of the program as a whole. In addition, the development and implementation of a comprehensive coding system (“taxonomy”) also will be invaluable in describing our funded program portfolio to internal staff and external stakeholders.
Scope

The proposed evaluation will provide a framework for assessing the program based on how well the program has achieved its goals and supported PCORI’s Engagement Priorities (see Figure 1). This assessment will provide a framework for assessing the program from the pre-award/application phase to identify who applied to the P2P program and who ultimately received an award. This assessment also will help “tell the story” of the awardees involved in the program to date, how well they met program deliverables and how these deliverables relate back to PCORI’s Engagement Priorities, and overall P2P goals, as well as help program staff identify how the current portfolio strengthens PCORI’s overall organizational and research enterprise as it relates to PCORI’s mission, vision, strategic goals/objectives, and so on. This cohesive story will complement and enrich the narrative related to describing PCORI’s overall funded project portfolio to date, inclusive of research foci and programmatic funding.

*Figure 1. Engagement and Pipeline to Proposal Awards Program Goals*
Additionally, by measuring stakeholder engagement occurring within and as a result of the P2P program, it is expected that we will have a more robust picture of the program’s early impact, reach, and ability to connect diverse stakeholder groups to better engage in patient-centered outcomes research (PCOR)/CER. It will also identify what groups have not been engaged effectively, based on aspects such as geography, health topic, industry/sector, or key populations served.

The development/implementation of a taxonomy will allow for describing the P2P program’s portfolio within PCORI, as well as to external stakeholders. This taxonomy will be informed by a broader organizational taxonomy being created for PCORI research awards and the Eugene Washington PCORI Engagement Awards. The contractor may be required to consult with PCORI staff members who have been a part of developing the organizational taxonomy on an as-needed basis to discuss the P2P program’s taxonomy.

**Specific Requirements/Tasks**

The contractor must perform the following tasks through this contract:

*Task 1—Perform an in-depth analysis of the P2P program portfolio to assess the program from a process and outcome perspective.*

The contractor will review systematically information collected on all P2P projects. The contractor will work with P2P program staff on current measures in place to ensure appropriateness and/or suggest alternative metrics for capturing project information most appropriately. This effort will provide a robust narrative of the program, as well as help program staff identify how the current portfolio strengthens PCORI’s overall organizational and research enterprise as it relates to PCORI’s mission, vision, strategic goals/objectives, and so on.

Key activities to be completed under this task include the following:

- Review all programmatic materials used to collect information from P2P awardees since the launch of the program to monitor the program’s progress toward its goal of increasing the meaningful engagement of stakeholders in patient-centered outcomes research.
  
  - Examine P2P awardee reports to assess processes that awardees completed toward achieving program deliverables during the award period.

- Explore how P2P helps PCORI achieve its Engagement Imperative.
  
  - Describe the effect of P2P in developing a PCOR community based on the availability of people to conduct, promote, and partner on or participate in patient-centered CER; the quality of contributions from engaged partners; and/or stakeholder participation in disseminating findings.
Identify unanticipated benefits that awardees have experienced by participating in the program.

Provide recommendations to help inform future program design and administration, if applicable.

Expected Deliverables:

- Analysis report of P2P portfolio findings, which should include supporting explanatory visuals, as needed and appropriate
- Key recommendations on action items/next steps for better achieving the goals and objectives of the P2P program
- Tools to tell the story of the program to multiple audiences, including those outside of PCORI and the Board of Governors, as graphics, written, as slides, and the like

Expectations for PCORI Staff:

- Provide contractor access to copies of all program materials to complete the program portfolio review. Program materials may include audio/video files, online resources, written materials, and other media.
- Maintain availability for questions and discussions with the contractor, as needed, on drafts of written portfolio analyses and key recommendations offered.

Task 2—Perform an in-depth analysis of the P2P program portfolio from application to award, to assess program applicants and awardees.

The Contractor will review data related to Letters of Intent (LOIs) and applications received over the lifetime of the program to identify the applicants to the program and assess the stakeholder groups that submitted LOIs to identify whether and why certain groups, if any, found success with P2P.

Key activities to be completed under this task include the following:

- Review systematically information collected on all P2P applicants. This effort will provide a robust narrative of the applicants and awardees of the program.
- Examine declined submissions for categorization based on areas such as health topic, target stakeholder population, key activities and/or outputs proposed, and whether rejection was associated with the timing or availability of PCORI research funds.
- Review declined applications, including those marked as “non-responsive” to identify if there are key PCORI stakeholder groups that are consistently unsuccessful in securing funding through P2P.

Expected Deliverables:
• Written application to award report, including a summary of findings and key recommendations related to analysis of current program application and award evalulative metrics
  o The contractor may also utilize individual interviews with P2P award recipients (e.g., project leads, key project staff members) to gather pertinent information. If this is done, the contractor will need to provide initial and final interview questions, as well as individualized and aggregated findings from discussion analyses.

Expectations for PCORI Staff:
• Provide the contractor with copies of or access to all evaluation materials and metrics collected to date for the contractor to review, generate themes, and identify gaps.
• Work with the contractor to address all questions/requests for clarification, as well as facilitate any connections to other PCORI staff members or external stakeholders, as needed.
• Review in a timely fashion all draft and final documents and resources developed by the contractor.

Task 3—Assess patient and stakeholder engagement within and across the portfolio of projects funded by the P2P program.

For this task, the contractor will seek to identify specific examples of how patients, researchers, and key stakeholder groups have been engaged and are collaborating through their participation in the P2P program. This task will uncover how PCORI’s unique approach to developing a PCOR community affects the availability of people to conduct, promote, and partner on or participate in patient-centered CER; the quality of contributions of engaged partners; and stakeholder participation in dissemination of findings, both for providing examples of learnings from the P2P Awardees and for helping inform or direct future comparative CER projects supported by PCORI.

Additionally, PCORI collects information on engagement from our research awardees and their partners. The successful contractor may consider ways to adapt the information collected through other PCORI funding mechanisms for the purpose of informing, focusing, or enhancing the scope of patient/stakeholder activities through P2P. As such, a goal of this task may also be to include findings that reflect other PCORI efforts so that the organization is in a better position to provide a more singular narrative about the impact of engagement. Key activities to be completed under this task include the following:
  o Quantify the number and type of reported stakeholders engaged per project, as well as the methods by which they are engaged and the activities in which they were involved.
• Catalog examples of how patient/stakeholder involvement has affected projects (e.g., project success stories, level and frequency of participation, expanded connections with other stakeholder groups), which can be disseminated within and outside PCORI. This will help generate knowledge on how patients and stakeholders use and view PCOR, build greater capacity for PCOR participation, and strengthen dissemination channels for PCOR evidence.

  o Provide a graphical view of the geographic focus and types of stakeholders included in the current portfolio to allow opportunities to describe the network of organizations involved in PCOR.

• Mapping the geographic areas and stakeholder types will allow for examination of how the P2P portfolio mirrors and/or complements that of PCORI’s overall funded research portfolio. It may also be useful for assessing gaps or oversaturation by type of P2P awardee.

  o Recommend standardized processes for capturing patient/stakeholder engagement information and methods across each award, and recommend other ways to evaluate patient/stakeholder engagement in current awarded projects.

  • The contractor will base process(es) on current evidence through a literature scan.
  • The contractor also will include findings from the LEArning about Partnership (LEAP) Survey that multiple cohorts of awardees completed and the subsequent reports provided by a previous contractor.
  • The contractor will consider the usage and frequency of information solicitation methods such as awardee surveys and final project reports (see Appendix A to also learn about partnerships resulting from P2P or engagement in research following project completion.

**Expected Deliverables:**

• Written patient and stakeholder engagement report, including a summary quantifying and describing findings related to stakeholder groups and themes identified, with examples of stakeholder involvement that can be used to publicize the successes of P2P program collaborations with diverse groups
  
  o The contractor may provide this information in the form of a written narrative, inclusive of visual/graphic displays, or as slides highlighting key project information/findings, as appropriate.
• A list of potential post-action survey questions/tools that may be administered to program awardees following submission of deliverables such as quarterly and final progress reports, in order to help P2P staff systematically collect information on stakeholder populations being engaged and how they are being involved during and after their project work.

**Expectations for PCORI Staff:**

• Provide the contractor with access to copies of all program materials to complete the stakeholder mapping review. Program materials may include audio/video files, online resources, written materials, and other media.

• With the contractor, discuss and agree on examples of “successful” patient/stakeholder involvement and its impact on projects.

• Work with the contractor to address all questions/requests for clarification and facilitate any connections to other PCORI staff members or external stakeholders, as needed.

• Review in a timely fashion all draft and final documents and resources developed through the contractor’s work, including reviewing the summary of stakeholder group findings and suggested metrics for ongoing assessments of groups.

**Task 4—Develop a project coding taxonomy to assist in reporting on the P2P program’s portfolio over time.**

The contractor will work in concert with P2P staff to develop and implement a comprehensive coding system (taxonomy) that can categorize P2P projects based on descriptive information derived from their LOIs, funding applications, and executed contract workplans. The contractor will need to demonstrate qualitative data analysis experience and expertise that will allow them to synthesize existing health sciences research terminology in the process of conducting a data-driven analysis of PCORI’s unique portfolio. Reviewing and comparing this taxonomy will ensure that the organization as a whole will be able to effectively communicate a singular narrative regarding its portfolio and the research and program projects in it. Having access to a medical librarian or a contractor familiar with the development and systematic application of a coding taxonomy for health sciences research may be necessary.

Due to the nature of PCORI’s work and our ongoing refinement and development of PCORI processes, we are unable to predict all possible coding needs once historical data are coded. Flexibility in output and time to produce deliverables is highly desirable with the selected contractor. The contractor may also need to work with PCORI’s information technology staff to ensure data are usable, accessible,
and customizable by internal team members. Specific activities to be accomplished under this task include the following:

- Work with the P2P program team to determine the rules and rationale, and produce a framework for coding the funded portfolio, while specifically considering and reconciling PCORI’s unique patient-centered terminology with established health sciences research terminology (MeSH, UMLS, etc.). The contractor also will have to work with the PCORI team to ensure that the taxonomy framework is aligned with a previously developed taxonomy used to code and categorize awarded projects funded through PCORI’s research awards portfolio and the Eugene Washington PCORI Engagement Award Program, which has different aims/goals and objectives than the P2P program. On the most basic reporting level, PCORI envisions our funded projects described through a series of discrete codes (categories), both broad and specific. These categories may include the following:

  - PCORI Priority Topic Area
  - PCORI Priority Population
  - Disease/Condition
  - Geographic Area
  - Funding Cycle
  - Awardee Type (Patient/Stakeholder/Researcher)
  - Engagement Strategies/Approaches
  - Project Outputs/Outcomes

- Systematically and comprehensively apply the taxonomy to the entire P2P funded program portfolio once the taxonomy and rules for applying the taxonomy are established.

  - The contractor will receive reports for approximately 353 awarded projects. All data should be coded based on the established taxonomy and returned to PCORI in a database deemed most appropriate and user friendly by the contractor, following consultation and discussion with, and approval by, P2P program staff regarding utility and most desirable features.

- Identify how the P2P portfolio may complement PCORI’s overall research enterprise by mapping P2P awards with other PCORI research funding to show alignment.

  - Map overlaps in research program and Eugene Washington PCORI Engagement Award Program areas based on what has been funded under the P2P program to date. This can help identify associations between topics and categories of funding
among the three portfolios to date, as well as identify potential gaps in project
distribution based on primary health topic, geography, or stakeholder group
targeted.

- Identify key stakeholder groups, as highlighted in awardee submissions (e.g., LEAP
  Survey; monthly, quarterly, mid-project, and final reports) that may utilize the
deliverables produced through P2P projects.

**Expected Deliverables:**

- Program portfolio taxonomy framework containing historical coding reflective of
  all awarded P2P projects
- Populated project database capturing all project information reviewed and
coded during the development of the taxonomy framework
- Coding definitions, data dictionary, guidebook, or other resources that will allow
  PCORI staff to use the data to answer future portfolio questions

**Expectations for PCORI Staff:**

- Provide the contractor with information/resources acquired during PCORI’s
  organization-wide taxonomy development processes and findings, as well as
  initial taxonomy options specifically developed for and considered by the P2P
  program team for their program purposes.
  - Work with the contractor to brainstorm the main coding areas and
    subcodes that match the priorities of the P2P program, the
    Engagement Department, and PCORI.
- Address all questions/requests for clarification, and review in a timely fashion all
draft and final documents and resources developed by the contractor, including
all taxonomy components created or recommended.
  - Link the contractor with internal PCORI staff involved in developing the
    organization-wide taxonomy, and/or with the contractor responsible for
    completing this effort, as needed.
- Review in a timely fashion the final populated project database to ensure
  accuracy, acceptability, and completion.

**Task 5—Provide a final summary report describing the overall effort and offering high-level recommendations to conclude the current P2P program and recommendations for reestablishing**
the program, or a similar initiative, in the future.

The contractor will develop a final report, no longer than 15 pages, summarizing and discussing the findings from Tasks 1–4. This summary will include high-level recommendations for closing out the existing P2P program and considerations for a potential reconstitution of the program in the future. The contractor will work with P2P program staff to review the recommendations and considerations, ensuring a clear understanding and usability. This effort will provide a narrative of all activities undertaken in this contract, recommend to program staff how to proceed with an orderly program closeout, and offer recommendations for a potential future reestablishment of the P2P program or a similar initiative.

Key activities to be completed under this task include the following:

- Review and synthesize the four tasks and associated deliverables completed as a part of this project
- Provide reflections and recommendations regarding effective program closeout and considerations for potential future reestablishment of seed funding initiative

Expected Deliverables:

- Written final summary report of P2P program portfolio analysis, no longer than 15 pages, including the following:
  - Description of overall programmatic effort
  - High-level recommendations for closing out the existing P2P program
  - Considerations for a potential reconstitution of the program, or one like it, in the future

Expectations for PCORI Staff:

- Maintain availability for questions and discussions with the contractor, as needed, as well as for dialogue on drafts of the project synthesis and key recommendations offered.
Deliverables/Delivery Schedule

Each deliverable shall be provided to PCORI. All deliverables must be completed and include, but not be limited to, the following:

1. Kickoff meeting agenda, minutes, and action items
2. Project management plan
3. Weekly/monthly status reports
4. Written summary of analysis of P2P program portfolio, including categorization of items such as topical areas, key stakeholder groups, geographic focus, and type/categories of deliverables completed
5. Report on P2P application to award analysis, outlining the statistics and narrative of who has applied to the P2P program, and if the applications were awarded or declined
6. Report on stakeholder engagement across the awarded portfolio, identifying successes and challenges associated with methods employed
7. Program portfolio taxonomy framework and populated database system

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Description</th>
<th>Quantity/Media</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – Kickoff Materials</td>
<td>• PCORI and contractor discuss and agree on specific tasks and deliverables, including deadlines.</td>
<td>Submit one electronic copy.</td>
<td>Within one month of project kickoff meeting</td>
</tr>
<tr>
<td>2 – Project Management Plan</td>
<td>• PCORI reviews project management plan (as applicable) and returns to contractor with PCORI's comments.</td>
<td></td>
<td>Within two weeks of project kickoff meeting</td>
</tr>
<tr>
<td></td>
<td>• Contractor submits final project management plan with PCORI's comments addressed.</td>
<td>Submit one electronic copy.</td>
<td>Seven business days after receiving PCORI's comments</td>
</tr>
<tr>
<td></td>
<td>• PCORI approves final project management plan.</td>
<td></td>
<td>Seven business days after receiving final project</td>
</tr>
<tr>
<td>Task Order</td>
<td>Description</td>
<td>Response</td>
<td>Timeline</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
<td>----------</td>
<td>---------</td>
</tr>
<tr>
<td>3 – Project Status Updates</td>
<td>Contractor works with PCORI to schedule monthly/status check-in calls to discuss project progress.</td>
<td>Provide write-up of call discussions/action plan.</td>
<td>Monthly (by the 15th business day of each subsequent month)</td>
</tr>
<tr>
<td></td>
<td>Contractor submits project status reports to PCORI for review/approval.</td>
<td>Submit one electronic copy.</td>
<td>Monthly (by the 15th business day of each subsequent month)</td>
</tr>
<tr>
<td></td>
<td>PCORI reviews status reports and returns to contractor with comments regarding approval or for clarification.</td>
<td></td>
<td>Within two weeks of receipt</td>
</tr>
<tr>
<td></td>
<td>Contractor resubmits status reports with questions answered/clarification provided, as needed.</td>
<td>Submit one electronic copy, as applicable.</td>
<td>As needed, within seven business days of receipt of PCORI's comments</td>
</tr>
<tr>
<td>4 – Program Portfolio Analysis (Task 1)</td>
<td>Contractor submits program portfolio analysis report with accompanying materials.</td>
<td>Submit one electronic copy.</td>
<td>Within five months of project launch</td>
</tr>
<tr>
<td></td>
<td>PCORI reviews report/accompanying materials and returns to contractor with comments regarding approval or for clarification.</td>
<td></td>
<td>Within one month of receipt of report</td>
</tr>
<tr>
<td></td>
<td>Contractor resubmits report/accompanying materials with questions</td>
<td>Submit one electronic copy.</td>
<td>Within two weeks of receipt of</td>
</tr>
<tr>
<td>Task</td>
<td>Description</td>
<td>PCORI’s Comments</td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
<td>------------------</td>
<td></td>
</tr>
<tr>
<td>5 – Application to Award Report (Task 2)</td>
<td>Contractor submits an application to award report and supporting materials.</td>
<td>Submit one electronic copy. Within six months of project launch.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PCORI reviews report and all attachments, and returns to contractor with comments regarding approval or for clarification.</td>
<td>Within one month of receipt of report.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contractor resubmits report and/or attachments with all questions answered/clarification provided, as needed.</td>
<td>Submit one electronic copy. Within two weeks of receipt of PCORI’s comments.</td>
<td></td>
</tr>
<tr>
<td>6 – Stakeholder Engagement Report (Task 3)</td>
<td>Contractor submits a stakeholder engagement report and draft survey questions/tool.</td>
<td>Submit one electronic copy. Within seven months of project launch date.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PCORI reviews report and all attachments, and returns to contractor with comments regarding approval or for clarification.</td>
<td>Within one month of receipt of written report.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contractor resubmits report and/or attachments with all questions answered/clarification provided, as needed.</td>
<td>Submit one electronic copy. Within two weeks of receipt of PCORI’s comments.</td>
<td></td>
</tr>
<tr>
<td>7 – Program Taxonomy, Database, and Background Documents (Task 4)</td>
<td>Contractor meets with PCORI and submits a taxonomy framework, database system, and all necessary background documents (e.g., data)</td>
<td>Meet in person; submit one electronic copy and a backup file via zip drive or other device. Within eight months of project launch.</td>
<td></td>
</tr>
<tr>
<td>Task</td>
<td>Description</td>
<td>Deadline</td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>PCORI reviews taxonomy framework, database, and background documents and provides questions or areas needing clarification or improvement</td>
<td>Within one month of receipt of taxonomy framework, database, and background documents</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contractor updates taxonomy framework, database, and background documents and/or provides a report in which PCORI’s questions have been addressed</td>
<td>Submit one electronic copy. Within one month of receipt of PCORI’s comments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 – Final Project Summary Report (Task 5)</td>
<td>Contractor submits a final project summary report (up to 15 pages) describing overall effort and high-level recommendations to conclude current P2P Awards program and for possibly reconstituting the program in the future</td>
<td>Submit one electronic copy. Within eight months of project launch date</td>
<td></td>
</tr>
<tr>
<td>PCORI reviews report and any attachments, and returns to contractor with comments regarding approval or for clarification</td>
<td>Within one month of receipt of report</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contractor resubmits report and/or attachments with all questions answered/clarification provided, as needed</td>
<td>Submit one electronic copy. Within two weeks of receipt of PCORI’s comments</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Acceptance of Deliverables**

PCORI will review and provide comments on each deliverable within seven (7) business days of receipt of the deliverable or within such other reasonable time frame as agreed upon by the Contractor and PCORI, given the nature of the deliverable being reviewed by PCORI. PCORI and/or the Project Lead shall provide the Contractor with written acceptance or rejection (with specified reasons). The Contractor will have seven (7) business days or other reasonable time frame as agreed upon by the Contractor and PCORI to complete and deliver changes made as a response to the PCORI’s (and/or the Project Lead’s) comments. The Contractor shall be allowed one re-submission of deliverable. If the re-submission is rejected, the assigned Project Lead, PCORI’s Procurement Office and the Contractor’s representative will arbitrate a resolution. If PCORI or the assigned PCORI Project Officer does not meet its deadline or provide notice of an extension request, it is the Contractor’s responsibility to contact the PCORI Project Officer to inquire about the submitted deliverable.

**Kickoff Meeting**

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

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

PCORI also will discuss the roles and responsibilities of the PL during the kickoff meeting.
**Project Leader’s Authority**

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

(a) Technical direction must be within the scope of the specification(s)/work statement.

(b) Technical direction may be oral or in writing.

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

1. Constitutes a change of assignment or additional work outside the specification(s)/statement of work;
2. In any manner which causes an increase in the agreement’s price or a change in the agreement’s period of performance;
3. Changes any of the terms, conditions, or specification(s)/work statement of the agreement and/or the resultant task orders;
4. Interferes with the contractor’s right to perform under the terms and conditions of the agreement and/or the resultant task order
BUDGET (Hours/Costs)

The contractor is not to exceed the following hours and/or cost for this task order/SOW without written authorization from the Procurement Office.

<table>
<thead>
<tr>
<th>Labor Category/Description of Service</th>
<th>Hours</th>
<th>Price/Cost Per Hour</th>
<th>Total Cost/Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Direct Costs Total (this can include Travel, printing, materials)</td>
<td></td>
<td>$XX,XXX.XX</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task Order/SOW Total Cost/Price (Not-To-Exceed)</td>
<td></td>
<td>Less than $500,000.00</td>
<td></td>
</tr>
</tbody>
</table>

Period of Performance

The Period of Performance for this task order is ten (10) months from date of award. The Task Deliverables and Due Dates are listed above. The project start date is estimated to be June 11, 2018 and questions related to this RFQ should be submitted to procurement@pcori.org.
Type of Task Order

PCORI expects to award to 1 contractor a Cost Reimbursable task order. This task order type provides an estimate of the work required to be performed over the task order period. Contractors must be able to perform all activities described in the task order.

Task Orders

The Contractor shall ensure adequate resources are dedicated to satisfy the requirements of task orders including, but not limited to, furnishing the necessary personnel, material, and services as required. In addition, inherent in providing these goods and services, the Contractor shall provide the supervision and management effort necessary for efficient and effective administration and control of work performed under the task order.

For Time and Material and Cost Reimbursement Task Orders: The Contractor will be required to provide Technical Status Reports that describe at a minimum, the technical progress per the requirements of the respective Task Order. The frequency (e.g., monthly) of when these reports are due will be outlined in the Task Order request. The Contractor will also be required to provide a final report which shall consist of (at a minimum) the work performed and results obtained for the entire Task Order’s period of performance. The report shall be in sufficient detail to describe comprehensively the results achieved and it should be submitted before the last day of the Task Order performance period. A technical status report will not be required for the period when the Final Report is due.
Proposal Evaluation Criteria

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

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

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

Proposals will be evaluated using the following criteria:

<table>
<thead>
<tr>
<th>Category</th>
<th>Weight of Rating Factor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Approach</td>
<td>35%</td>
</tr>
<tr>
<td>Organization and Staffing</td>
<td>15%</td>
</tr>
<tr>
<td>Project Management Plan</td>
<td>15%</td>
</tr>
<tr>
<td>Past Performance</td>
<td>35%</td>
</tr>
</tbody>
</table>

Awards will be made to Contractors who propose the best value, with the technical approach being most important. PCORI will consider the evaluation factors indicated below.
Technical Solution

Submit a narrative that addresses the IDIQ holder’s ability to demonstrate that they have a technical understanding of the requirements and the overall capability and experience in providing the requirements specific to meet the needs of the PCORI. IDIQ holder must provide a detailed plan that includes a description of the proposed approach and a detailed draft project management plan outlining the requirements in the task order; describes what events/activities are envisioned, contacts and resources proposed to accomplish the tasks; and demonstrates how the proposed approach will accomplish the objectives specified. This proposal should also describe the proposed methodology, management, key personnel, staffing and corporate experience that are directly relevant to the description/scope of work described herein. Additionally, please feel free to provide any other information to illustrate a thorough understanding of this effort.

Project Management Plan

The Offeror shall propose a comprehensive Project Management Plan. The Project Management Plan must give PCORI a high degree of confidence that the Offeror has a robust plan for conducting the tasks and submitting high-quality deliverables; the Plan should feature clear actionable strategies and timeframes for accomplishing the requirements and objectives. The Project Management Plan must be fully integrated with the Task Order and requirements within this RFP. The Project Management Plan shall address the Offeror’s overall capability to manage the work required. Please include an organization chart with named personnel that demonstrate reporting lines and areas of responsibility. Résumés shall be provided in an appendix for the named key personnel who demonstrate experience in similar positions on prior projects/contracts that are similar and relevant to the scope and complexity contemplated.

Personnel proposed must demonstrate core expertise in the tasks anticipated. If the use of teaming partners and/or subcontractors is proposed, clearly articulate their roles and demonstrate their relevant experience. The Project Management Plan shall describe the overall plan for organizing, staffing, and managing the tasks; how organization roles and responsibilities will be divided, decisions made, and work monitored; exceptions management; and assurance of quality and timeliness to meet PCORI’s requirements. The Offeror is to demonstrate how it will perform all of PCORI’s requirements, objectives, overcome or mitigate constraints, and meet or exceed contract performance requirements.
**Past Performance**

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

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

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

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

**Price Proposal**

IDIQ Holder should provide detailed pricing in response to this TORFP.

The written price proposal shall contain the following:

1. IDIQ holder will demonstrate how they arrived at their proposed pricing by detailing labor categories, labor rates and travel costs.
2. IDIQ holder is encouraged to offer discounts from their IDIQ pricing.
3. Proposed pricing must include estimated direct expenses including all subcontractor labor (if applicable), travel costs, and other direct expenses. Include burden as applicable, specifying burden rates and burden calculations.
4. Travel costs should be estimated based on the number of travelers, an assumed number of trips and the duration of the trip. Air fare, lodging and per diem estimates/assumptions should also be stipulated.
5. The proposal should use a font size which is not smaller than 11-point font.
Purple | Exceeds evaluation standards in a beneficial way; has a high probability of satisfying the requirement and has no significant weakness.

Blue | Meets and sometimes exceeds the evaluation standards and demonstrates a good understanding and ability to meet PCORI’s requirements. There is little risk to PCORI, and the Offeror demonstrates one or more strengths that will benefit PCORI.

Green | Meets evaluation standards and will satisfy the minimum requirements. Weaknesses are minor and can be readily corrected.

Yellow | Fails to meet one or more evaluation standards. There is low probability of satisfying the requirements and the Offeror demonstrates one or more significant weaknesses or has numerous weaknesses.

Red | Fails to meet minimum requirements, and noted deficiencies require major revisions to the proposal in order to make the proposal acceptable.

Award without Communications or Clarifications

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

Best and Final Offers

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

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

Late Submissions

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

Retention of Proposals

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

Documentation Requirements

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

Basis of Compensation to the Contractor

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

Post-Award Debriefing

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

PCORI Rights

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

Furnishing of Equipment/Property

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

Place of Performance

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

Hours of Service

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

Insurance

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

Non-Disclosure Requirements

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

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

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

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

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

Compliance

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

Invoice Content

The Contractor shall invoice on a monthly basis. The invoice shall include the period of performance covered by the invoice and the level of effort for each task performed. All hours and costs shall be reported by division, task, and labor category, and shall be provided for the current billing month and in total from project inception to date. If teaming or subcontracting is proposed, one consolidated invoice from the prime Contractor shall be submitted in accordance with other terms and conditions of the
The invoice must be signed by an individual authorized by the Contractor. The Contractor shall provide the invoice data in spreadsheet form with the following detailed information (the listing shall include separate columns and totals for the current invoice period and the project to date, identified by division and task):

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

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

**Billing and Payment Procedures**

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

Billing address:

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

Please submit your response including a budget with the reference to TORFP # PCO-P2P Evaluation-Task Order # 9 to procurement@pcori.org by 5:00PM ET on May 11th, 2018. If needed, PCORI will open negotiations to finalize the terms and conditions of this task order with your organization.

Technical responses to the Task Orders may not exceed 30 pages. Expected page limits for each section are as follows:

1. Technical Approach – no more than 12
2. Organization and Staffing – no more than 3
3. Project Management Plan – no more than 5
4. Past Performance – no more than 3
5. Price proposal-no more than 4

Responses are to be streamlined and succinct to the extent practical based on the dollar value and complexity of the work. Responses will provide sufficient information to be considered and at a minimum the responses will include:

- Price/Cost for all orders; the proposal may include a detailed price/cost per hour based on the overarching rates within the IDIQ Agreement and the applicable fixed fee per hour of all resources required to accomplish the task as set forth in the TORFP. Discounted prices/costs from the overarching IDIQ rates are encouraged under the TORFP.
- Conflict of interest information if applicable.
- Technical information, e.g., technical approach, including management plan, team partners and experience.
- Technical data, computer software, computer software documentation and background invention restriction information, if applicable
- Proposed Key Personnel.
Appendix A:

Past final reports asked for the following information that may be useful for this evaluation:

1. Describe any significant changes to your work plan or project objectives/deliverables since your Tier II project began.

2. To what extent did this project develop your partnership and prepare you to pursue additional (PCORI or non-PCORI) sources of funding?

3. PCORI encourages seeking outside funding sources for your project. Provide a description of the funding sources you have looked at, include whether or not you have submitted an LOI or application and/or if you have been awarded outside funding.

4. Have you submitted an LOI to PCORI? If yes, to which PCORI program and when did you submit an LOI? Were you invited to submit a proposal?

5. Please list any presentations and/or articles that your project has generated since the third quarter report.

6. Describe what type(s) of technical assistance you would find valuable to strengthen your partnership for research.

7. What was the most helpful or important assistance you received from your Pipeline Award Program Office (PAPO) during Tier II?

8. Describe any lessons you have learned about partnership development you would like to share with future Tier II awardees.

9. Describe any accomplishments or benefits derived from your partnership that were not anticipated when you planned your Tier II project.

10. Please share anything else you would like to about this project.
Appendix B: Past Performance Questionnaire

SECTION 1: CONTRACT IDENTIFICATION

A. Contractor: ________________________________
B. Contract Number: __________________________
C. Contract Type: ______________________________
D. Period of Performance: _______________________
E. Current/Final contract cost: ___________________
F. Description of services provided:

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

SECTION 2: CUSTOMER IDENTIFICATION

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

______________________________________________________________________________

SECTION 3: REFERENCE IDENTIFICATION

A. Reference’s Name: ________________________________
B. Reference’s Title: ______________________________
C. Reference’s Phone/Fax Number: ____________________
D. Reference’s E-mail Address: ________________________
SECTION 4: EVALUATION

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

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

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

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

*Please discuss each response for which you indicated Excellent, Good, Marginal, or Unacceptable below:*
NARRATIVE SUMMARY:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Reference’s Signature  Date

THANK YOU FOR YOUR PROMPT RESPONSE AND ASSISTANCE! Please return this completed questionnaire no later than April 20, 2018, 2:00 pm (Eastern Time) to:

   RFP@pcori.org  
   Subject: TORFP # PCO-P2P Evaluation-Task Order # 9 – Past Performance