## Patient-Centered Outcomes Research Translation Center

REQUEST FOR PROPOSAL

RFP # PCO-PCORTC2016

March 21, 2016

<table>
<thead>
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<th>KEY DATES</th>
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<tr>
<td>Request for Proposal Released</td>
<td>March 21, 2016</td>
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<tr>
<td>Deadline for Questions</td>
<td>April 18, 2016</td>
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<tr>
<td>Deadline for Proposals</td>
<td>May 23, 2016</td>
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<tr>
<td>Projected Award Date</td>
<td>June 24, 2016</td>
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<td>Projected Start Date</td>
<td>July 1, 2016</td>
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About PCORI

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

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

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

PCORI seeks to contract to establish a Patient-Centered Outcomes Research Translation Center (PCOR-TC) that will provide support for PCORI’s mandate to publicly release research findings in a manner accessible to the general public and clinicians and other health care providers. Under a services contract with PCORI, the PCOR-TC will create lay public and clinician abstracts summarizing research findings from all PCORI-funded research projects. As described in PCORI’s authorizing law, these materials will include considerations specific to certain subpopulations and describe research methods and limitations.

In addition, the PCOR-TC will support PCORI by providing input into the identification of potential high-impact research findings, developing context for the dissemination and implementation of findings as selected by PCORI, contributing to PCORI’s dissemination planning for high-impact PCORI-funded research results, and developing and implementing dissemination activities for selected research results. PCORI expects to make one award.

The initial Period of Performance (POP) is 3-years after the date of award, with two (2) optional one (1) year renewals.

This will be a Cost Reimbursable contract. The Contractor will operate at the direction of and receive guidance from PCORI.
How to Proceed

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

2. **Consider the Evaluation Criteria**
   Consider the organization eligibility requirements and PCORI’s specific requirements to see whether your organization, your interests, and your capabilities fit 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 23, 2016.

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

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<tr>
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<th>Description</th>
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<tr>
<td>AHRQ</td>
<td>Agency for Healthcare Research and Quality</td>
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<td>BAFO</td>
<td>Best and final offer</td>
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<td>CDS</td>
<td>Computer decision support</td>
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<tr>
<td>CER</td>
<td>Comparative effectiveness research</td>
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<tr>
<td>EDA</td>
<td>Effective date of award</td>
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<tr>
<td>FPRA</td>
<td>Forward Pricing Rate Agreement</td>
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<tr>
<td>FTE</td>
<td>Full time equivalent</td>
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<tr>
<td>ICE</td>
<td>Independent Cost Estimate</td>
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<tr>
<td>NDA</td>
<td>Non-Disclosure Agreement</td>
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<tr>
<td>NICRA</td>
<td>Negotiated Indirect Cost Rate Agreement</td>
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<tr>
<td>OCI</td>
<td>Organizational Conflict of Interest</td>
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<tr>
<td>ODC</td>
<td>Other direct costs</td>
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<tr>
<td>PCOR</td>
<td>Patient-centered outcomes research</td>
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<td>PCORI</td>
<td>Patient-Centered Outcomes Research Institute</td>
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<tr>
<td>PCOR-TC</td>
<td>Patient-Centered Outcomes Research Translation Center</td>
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<td>PM</td>
<td>Program Management</td>
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<tr>
<td>POP</td>
<td>Period of performance</td>
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<td>RFP</td>
<td>Request for Proposal</td>
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<td>SOW</td>
<td>Scope of work</td>
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<td>TEP</td>
<td>Technical Expert Panel</td>
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Definitions

We define the following terminology as a reference for the text contained in this document:

**Translation** is the presentation of research findings in language and format that improves its accessibility to and comprehension by the target audience.

**Dissemination** is the intentional, active process of identifying target audiences and tailoring communication strategies to increase awareness and understanding of evidence, and to motivate its use in policy, practice, and individual choices\(^2\).

**Dissemination Strategy** describes mechanisms and approaches that are used to communicate and spread information about interventions to targeted users\(^3\).

- **Passive Dissemination Strategies** include mass mailings, publication of information, and presentations to groups.
- **Active Dissemination Strategies** include hands-on technical assistance, replication guides, point-of-decision prompts for use, and mass media campaigns.

**Implementation** is the deliberate, iterative process of integrating evidence into policy and practice through adapting evidence to different contexts and facilitating behavior change and decision making based on evidence across individuals, communities, and healthcare systems\(^4\).

**Diffusion** is the passive, untargeted, unplanned, and uncontrolled spread of new interventions. It is the least focused and intense approach in the diffusion – dissemination – implementation continuum\(^5\).

**High-Impact Project/Study/Topic** is a project, or cluster of projects related to a specific topic, that was not only successful in its execution (or in having an immediate tangible output), but that is expected to make or has made a significant impact on health care decision making. This impact may be at the level of the patient, health care provider, or health care policy. The project could meaningfully improve health; could improve policy-making, health standards, or quality of life; could change the scientific agenda; or could in some other way result in an important impact on health care decision making.

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\(^2\) [PCORI Dissemination and Implementation Framework](https://www.pcori.org/research-funding/dissemination-and-implementation-framework).


\(^4\) [PCORI Dissemination and Implementation Framework](https://www.pcori.org/research-funding/dissemination-and-implementation-framework).

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, and policy makers 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.

PCORI-funded research is intended to provide a better understanding of the prevention, treatment, and care options available and the science that supports those options.

Under PCORI’s authorizing law, PCORI is directed to make findings from PCORI-funded research available to clinicians, patients, and the general public and to ensure the transparency, credibility, and access to PCORI-funded research.

Specifically, the authorizing law states:

“RELEASE OF RESEARCH FINDINGS

--IN GENERAL.—The Institute shall, not later than 90 days after the conduct or receipt of research findings under this part, make such research findings available to clinicians, patients, and the general public. The Institute shall ensure that the research findings:

— (i) convey the findings of research in a manner that is comprehensible and useful to patients and providers in making health care decisions;

— (ii) discuss considerations specific to certain sub-populations, risk factors, and comorbidities, as appropriate;

— (iii) include limitations of the research and what further research may be needed as appropriate...” 42 U.S.C. § 1320e(d)(8)(A).

ENSURING TRANSPARENCY, CREDIBILITY, AND ACCESS

“(3) PUBLIC AVAILABILITY.—The Institute shall make available to the public and disclose through the official public Internet website of the Institute the following:

(A) Information contained in research findings as specified in [the law].

(B) The process and methods for the conduct of research, including the identity of the entity and the investigators conducing such research and any conflicts of interests of such parties, any direct or indirect links the entity has to industry, and research protocols, including measures taken, methods of research and analysis, research results,
and such other information the Institute determines appropriate concurrent with the release of research findings. 

The process for providing this information was adopted by the PCORI Board of Governors after a period of public comment, and is outlined in the document *PCORI’s Process for Peer Review of Primary Research and Public Release of Research Findings*. As part of this Board-adopted process, upon PCORI’s acceptance of a final research report from a research study following completion of peer review, PCORI will post information on its website about the research findings, including a 500-word lay summary of the study results for patients, consumers, and the general public. Qualified and experienced contractors of PCORI will develop a consistent format for the lay abstracts and develop and test lay abstracts for each completed PCORI-funded research study, with the approval of the relevant Awardee institution. In addition, PCORI will post on its website a 500-word abstract for health care medical professionals that describes the study and its results.

PCORI will engage in additional dissemination activities for many PCORI-funded research findings, particularly those with potentially high impact on health care decisions. Thus, PCORI is interested in conceptualizing, developing, and evaluating promising ways to disseminate these research findings beyond solely the development and posting of lay and clinician abstracts, which facilitate their uptake by patients, caregivers, clinicians, and policy makers for use in decision making. PCORI will work closely with the Agency for Healthcare Research and Quality (AHRQ) on dissemination activities.

Through this Request for Proposal (RFP), PCORI announces its intention to contract for the development and operation of the Patient-Centered Outcomes Research Translation Center (PCOR-TC). PCORI envisions that, through this RFP, it will contract with one center whose roles will include the following activities:

- Develop standardized formats for summaries of research, abstracts, and other materials and relevant processes relating to the Translation Center
- Develop Lay and Clinician Abstracts
- Develop Project Summaries
- Develop Summaries of Peer Review Comments
- Support Dissemination Planning
- Develop and Implement Selected Dissemination Activities.

Description of Services

This statement of work will describe tasks for completing the following activities of the PCOR Translation Center:

**Develop Lay and Clinician Abstracts**

- Design **standardized formats** for lay and clinician abstracts summarizing PCORI research. The formats will incorporate stakeholder input and be developed in consultation with PCORI and experts in translation, communication, and dissemination of research findings.
- For each completed PCORI-funded research study, develop a **lay public abstract** detailing the findings for placement on the PCORI website.*
- For each completed PCORI-funded research study, develop a **clinician abstract** detailing the findings for placement on the PCORI website, based on professional abstracts submitted by study investigators.
- Coordinate review of lay and clinician abstracts by Awardee and by PCORI; undertake revisions as needed prior to posting.

(*Note that while PCORI investigators will submit a draft professional abstract to PCORI, they will not submit a draft lay abstract.)

**Develop Project Summaries**

- Develop a consistent format for Project Summaries that will describe PCORI-funded research projects in clear and accessible language, which will be posted on PCORI website project pages.
- For newly funded projects, edit or revise the investigator-supplied Project Summary in collaboration with the PCORI Project Officer before it is posted to the PCORI website project page.
- For completed projects, revise the Project Summary currently on the PCORI website in collaboration with the PCORI Project Officer to reflect changes in the project and to assure it provides adequate background for the lay and clinician abstracts describing study results. The final Project Summary shall be completed and submitted to PCORI at the same time the lay and clinician abstracts are submitted.
- For ongoing PCORI-funded projects that are 1 year or more from completion, revise the Project Summary currently on the PCORI website, in collaboration with the PCORI Project Officer, as needed.
Develop Summaries of Peer Review Comments

- Following peer review of each completed study as provided in PCORI’s Process for Peer Review of Primary Research and Public Release of Research Findings, develop a clear, consistent, and accessible summary of important peer review comments based on a summary of comments prepared by PCORI’s Peer Review Contractor for placement on the PCORI website.

Support Dissemination Planning

- Based on criteria developed in collaboration with and approved by PCORI, identify specific research studies and/or clusters of studies that are likely to have high impact on patient, consumer, or clinician decision making.
- Summarize the evidence context for selected projects likely to have high impact; outline requirements for evidence mapping or systematic reviews when needed.
- Support PCORI work (including through a work group that is anticipated to be formed in 2016) in establishing priorities for dissemination of research findings.
- Drawing on stakeholder input as well as expertise in dissemination, propose promising and appropriate approaches to PCORI for dissemination of prioritized findings.
- Prepare materials required to submit nominations of selected priority PCORI research findings to AHRQ for dissemination activities under the direction of PCORI.
- Convene and summarize stakeholder and/or expert meetings to inform development of PCORI dissemination strategies for selected research findings.

Develop and Implement Selected Dissemination Activities

- Develop and implement dissemination activities for selected research findings.

Figure 1 below shows a schematic of the envisioned PCOR-TC. Working within the context of input from patients, other stakeholders in the health care system, and technical experts, the Translation Center will develop lay and clinician translation products to make all PCORI-funded research accessible to health care consumers and providers. In addition, the PCOR-TC will review the PCORI research portfolio and assist PCORI in assessing the evidence context, identifying priorities, and developing strategies for disseminating PCORI-funded research findings to improve health care decision-making. The PCOR-TC will develop and implement dissemination activities for selected findings.
Figure 1. Schematic of PCORI’s Patient-Centered Outcomes Research – Translation Center
Statement of Work: Task Requirements

TASK #1 – Create Technical Expert Panel (TEP)

1. Within 4 weeks of the date of award, the Contractor shall propose a TEP for review and approval by PCORI staff.
   a. The TEP shall have expertise in (at a minimum) translation and dissemination science and practice, health communication (with emphasis on health literacy and numeracy), risk communication, health information technology, patient engagement, and systematic review.
   b. The TEP shall have at least two patient representatives and two clinician representatives. Assume that the TEP shall have 10-15 members for budgeting purposes (although may propose more with rationale).
   c. The TEP shall be maintained throughout the duration of the contract, although individual members may have rotating terms with the approval of PCORI.

2. The role of the TEP shall be to:
   a. Provide strategic input on the development of the lay and clinician abstracts
   b. Provide input on means of developing alternative abstracts, such as audio abstracts for low literacy populations and visually-impaired individuals
   c. Assist with developing criteria for prioritizing research findings for more intensive dissemination activities
   d. Provide consultation on the array of dissemination activities that may be conducted by the PCOR-TC
   e. Assume other tasks at the discretion of the Contractor.

3. Finalize the list in response to PCORI input and invite TEP members within 8 weeks of the EDA.

TASK #2 – Prepare Templates for Lay and Clinician Abstracts of PCORI-Funded Research Findings

1. Survey PCORI-funded research projects to determine scope of research in progress.

2. The Contractor shall recruit focus groups, including patients with relevant conditions, caregivers, advocates, public/community members, and clinicians.
   a. Provide for diversity of ages, gender, race/ethnicity, geography.
   b. The Contractor shall also conduct focus groups among populations whose primary language is Spanish, to prepare for Spanish-language translations.
   c. Conduct focus groups for preferences in format and layout of lay and clinician materials, pilot the templates and revise based upon feedback.
   d. In planning the template and in developing the lay abstracts, the Contractor shall plan to develop materials at the 6th - 8th grade level (excluding the relevant terminology for the report if necessary, but these shall have lay definitions readily accessible to consumers).
e. Develop alternatives to written abstracts for low-literate populations or for other relevant audiences when required.

3. Based upon the focus group results, the Contractor shall submit draft templates to PCORI for review and feedback within 3 months. In addition to draft templates, the Contractor shall provide PCORI with interview guides and supporting materials, and a summary of groups interviewed and focus group results.

4. Revise and provide final templates to PCORI based upon feedback from PCORI. Templates to be used for developing lay abstracts.

**TASK #3 – Develop New and Revise Current Project Summaries**

1. Develop a consistent format for Project Summaries (approximately 250-350 words) for PCORI-funded research projects to be placed on PCORI website project pages. The format for Project Summaries should draw upon focus group input obtained to inform development of lay and clinician abstracts. Language for these summaries should be broadly accessible to non-researchers and highlight the decisional dilemma the evidence will address.

2. Submit draft format and samples to PCORI for review and approval of format.

3. Prepare and submit guidelines for project Awardees addressing how to structure the Project Summary. *(Note: Awardees generally submit the original Project Summary to PCORI as part of application for funding.)*

4. For newly funded projects, edit or revise the Awardee-supplied Project Summary in collaboration with the PCORI Project Officer before it is posted to the PCORI website project page.

5. For completed projects, revise the Project Summary currently on the PCORI website, in collaboration with the PCORI Project Officer, to reflect changes in the project and to assure it provides adequate background for the lay and clinician abstracts describing study results. The revised Project Summary must be completed (including relevant reviews) and submitted to PCORI at the same time the lay and clinician abstracts are submitted.

6. For ongoing PCORI-funded research projects that are at least 1 year from completion, revise the Project Summary currently on the PCORI website, in collaboration with the PCORI Project Officer. These revised Project Summaries (n = 400; See Table 1) are to be completed during the first 18 months of the contract, with PCORI identifying specific projects to be handled on a priority basis.

7. Submit draft summaries to PCORI and to Awardee for review and approval.

8. Revise based on feedback and submit final versions for posting on PCORI website.

9. For all projects for which a Project Summary is developed, edited, or revised, propose a revised Project Title or confirm the appropriateness of the existing title.
TASK #4 – Review Final Peer-Reviewed Research Report submitted to PCORI

The Contractor’s review of the Final Peer-Reviewed Research Report to draft key findings shall involve, at a minimum, individuals with content expertise and expertise in research methodology to review the study results and develop key findings. **The Contractor’s review can commence when PCORI receives the Draft Final Research Report. However, key findings must be reviewed and finalized after PCORI’s acceptance of the Final Research Report (following completion of PCORI peer review), so that key findings are consistent with the final version.**

1. For each Final Research Report, the Contractor shall review the Final Research Report and develop a list of draft key messages from the report reflecting:
   a. The research gap the study is addressing (to be based on materials submitted, except in cases where additional evidence review is needed). See Task #7 below.
   b. The design of the study.
   c. The key findings of the study, including consideration of specific sub-populations, risk factors, and/or comorbidities, as appropriate.
   d. The limitations of the research and further research needs, as appropriate.
   e. The significance of the findings for patients, clinicians, or other relevant audiences, including reference to the existing body of evidence, relevance to patient choices and/or changes in clinician practice.
   f. Any other issues identified in the development of the research abstracts and in the cognitive interviews.
   g. Submit draft key findings to PCORI and Awardee for review and approval.
   h. Finalize key findings based upon PCORI and Awardee input.

TASK #5 – Develop Lay and Clinician Abstracts from the Final Research Report submitted at the end of each PCORI Study, and Finalize them within 60 days of PCORI’s Acceptance of the Final, Peer-Reviewed Version of this Research Report (see Figure 2)

1. The timeline shall not exceed 90 days from PCORI’s acceptance of the Final Research Report to posting of the lay and clinician abstracts on PCORI’s website. For this reason, the Contractor must submit lay and clinician abstracts within 60 days, allowing 30 days for receipt and posting to PCORI.org.

2. PCORI provided materials will include Draft Final Research Reports, preliminary clinician abstracts drafted by the Awardee, final versions (peer-reviewed) of Final Research Reports.
3. Develop approximately 500-word lay and clinician abstracts that summarize the key messages of the PCORI study, with review and input by content experts for accuracy and context. Methodologic review may be requested by PCORI to ensure accuracy of translation. If not, methodologic review may be conducted or not at the discretion of PCOR-TC editorial staff. The lay abstract should be accessible to a lay member of the public and written at the 6th - 8th grade reading level.

4. Abstracts shall (i) convey the findings of research in a manner that is comprehensible and useful to patients and providers in making health care decisions; (ii) fully convey findings and discuss considerations specific to certain subpopulations, risk factors, and comorbidities, as appropriate; (iii) include limitations of the research and what further research may be needed as appropriate.

5. Draft culturally-appropriate Spanish-language versions of the lay abstracts shall also be developed at the 6th - 8th grade reading level.

6. Non-written forms of communication of the lay abstract – e.g., audio files – may be developed upon PCORI’s approval. Versions in languages other than Spanish may be developed for selected findings upon PCORI request.

7. Develop and maintain access to groups of patients, members of the public, and clinicians, members of which will participate in cognitive testing of draft materials. These participants should represent diverse population on race/ethnicity, gender, geographic distribution, and socioeconomic status (SES), and Spanish language participants for Spanish translations, as appropriate to the content of the research.

8. Conduct cognitive testing of lay abstract by patient and lay public members.

9. Conduct cognitive testing of clinician abstract by clinician representatives.

10. Based upon the results of testing, revise abstract as necessary to improve accuracy, clarity, understandability, or other issues identified on the testing.

11. Provide draft lay and clinician abstracts to PCORI and Awardee for review, along with testing results to PCORI.

12. Revise abstracts based upon PCORI and Awardee input; provide final to PCORI for acceptance.

13. See Table 1 for number of expected abstracts for budgeting purposes.

14. Upon acceptance, the Contractor shall provide an electronic copy to the PCORI webmaster, formatted for posting.
Figure 2: PCORI Timeline from Completion of Research to Posting of Results on PCORI.org

Table 1. PCORI-Funded Research Projects* Requiring Lay and Clinician Abstracts

<table>
<thead>
<tr>
<th>PCORI-Funded Research Projects Scheduled to Conclude in:</th>
<th>Number of Research Projects</th>
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<tbody>
<tr>
<td>2015</td>
<td>56</td>
</tr>
<tr>
<td>2016</td>
<td>124</td>
</tr>
<tr>
<td>2017</td>
<td>136</td>
</tr>
<tr>
<td>2018</td>
<td>77</td>
</tr>
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<td>2019</td>
<td>10</td>
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*Includes only projects PCORI categorizes as “Research” — excluding, for example, Engagement Awards. Data current as of February 2016.
TASK #6 – Summarize Peer Review Comments for PCORI Website Posting

1. Following PCORI’s peer review of each completed study, develop a summary of the peer review based on a summary of peer review comments prepared by PCORI’s Peer Review Contractor, for placement on the PCORI website.

2. The Summary shall be up to 500 words in length and should be in clear, consistent language accessible to non-researcher readers.

3. Submit the draft summary of peer review comments to PCORI and to PCORI’s Peer Review Contractor.

4. Revise summary in response to comments.

5. Provide final version to PCORI within 20 days after the lay and clinician abstracts are submitted.

TASK #7 – Review of PCORI-Funded Projects

The Contractor shall review PCORI-funded projects to identify those potentially warranting more intensive dissemination by AHRQ or PCORI.

1. Review PCORI-funded research portfolio.
   a. PCORI-provided information may include funded proposals, progress reports, or journal manuscripts, or other descriptive material.
   b. With TEP input, the Contractor shall propose criteria for identifying potential “high impact” topics for dissemination, i.e., prominent research findings that are expected to have an impact on patient and/or clinician decision making. This framework shall be revised with PCORI input.
      i. Dissemination priority may be recommended for individual studies or for clusters of studies addressing a specific area, e.g., disease or condition, specific population, etc.
      ii. Emphasis shall be placed on considering the context of current research knowledge when determining the potential for impact of individual research results or of clusters of studies.
   c. Based upon the criteria developed and approved, the Contractor shall provide a preliminary list identifying a minimum of 40 priority topics among in-progress PCORI-funded studies for possible dissemination efforts, with a 1-2 page statement of rationale for each topic.
      i. Identification of priorities shall take place before research results are submitted to PCORI, so that, if necessary, systematic reviews or other developmental work can be initiated.
      ii. If adequate information regarding the body of research evidence has not been developed (i.e., presented by the investigator or developed through a PCORI topic brief), the Contractor shall prepare a summary of recent evidence or submit a draft set of key questions to guide a potential systematic review, representing the required knowledge to confirm the priority of the research topic and to put the PCORI-funded research
findings into context for dissemination.

iii. Proposals for each topic shall include recommendations regarding the audience/targets for dissemination, dissemination activities, and proposed existing or to-be-developed tools to facilitate dissemination.

iv. The purpose of recommended dissemination tools shall be to educate consumers about study findings in the context of current research, to clarify preferences for treatments and outcomes (implicitly or explicitly), and to facilitate communication between patients and clinicians. Recommended tools shall not provide explicit guidelines or recommendations for treatment.

v. Proposed dissemination tools and activities might include:

(a) Decision aids or computer decision support (CDS) systems.
(b) Other educational products such as apps for computers and smart phones, or graphic novels.
(c) Working with study investigators to promote dissemination – e.g., author in the room or “TED” talks – and discussion of findings in the context of known research.
(d) Technical assistance with interpretation of study results for stakeholders who are interested in disseminating findings.
(e) The Contractor may propose additional approaches.

2. Following submission of Draft Final Research Reports, the Contractor shall review the proposed list of priority topics, adding or subtracting from it on the basis of study results and considering the results of PCORI peer-review. (List to be updated biannually.)

a. On the basis of the Contractor’s updated list, PCORI will identify selected topics for nomination to AHRQ for dissemination activities.

b. The Contractor shall prepare selected PCORI-funded research findings for nomination to AHRQ, including preparation of all materials AHRQ requires for submission.

**TASK #8 – Prepare Proposals for PCORI Dissemination Activities**

The Contractor shall consult with TEP and additional stakeholders as deemed necessary by PCORI to prepare proposals for PCORI dissemination approaches for selected all priority topics. (For topics nominated to AHRQ for dissemination, proposals may address additional PCORI or collaborative dissemination activities or audiences; PCORI will advise on whether or at what point to develop proposals regarding the AHRQ-nominated topics.)

1. Convene stakeholders on finalized topics to determine primary objectives and messages to communicate, primary questions that the research will answer, and relevant contextual background for the research results including reference to existing body of relevant evidence.

2. Propose to PCORI recommended audience(s) for specific findings.
3. Propose to PCORI specific translation and/or dissemination interventions, ranging from least intensive (marginal efforts beyond the preparation of the lay and clinician abstracts undertaken for all results), to intensive approaches for dissemination and integration into decision-relevant settings.

4. For selected interventions, submit to PCORI a work plan outlining the topic, the rationale for the topic and the type of intervention proposed, a timeline, and budget for development of the intervention, and recommendations for monitoring/maintenance of the intervention (if applicable) to ensure that the translation or dissemination intervention remains accurate and up to date.

5. Subject to approval by PCORI, execute selected work plans described above.

6. For any interventions requiring web integration with the PCORI website, the Contractor shall coordinate with the PCORI web team to produce website-ready applications, and shall provide for maintenance and troubleshooting of the applications.

For budgeting purposes, the Contractor should plan to develop and implement 10 dissemination activities mutually agreed to by PCORI and the Contractor, throughout the duration of the agreement.

OPTIONAL TASK – Develop Decision Aids

Optional task may be exercised at any time. This optional task will have the same Period of Performance as the base or option period in which the optional task is exercised. Should this optional task be exercised, the PCORI will notify the Contractor at least 60 days prior to the exercise of the necessary task. This optional task may be exercised more than once within the stated period of performance. Additional instructions are provided in the Submission Instructions around how to respond to this optional task:

1. The Contractor shall strategically develop and create decision aids as requested by PCORI.

2. The purpose of decision aids will be to:
   a. Educate patients and/or consumers about study findings in the context of current research.
   b. To clarify preferences for treatments and outcomes (implicitly or explicitly).
   c. To facilitate shared decision making between patients and clinicians.

3. Decision aids shall not provide explicit guidelines or recommendations for treatment.

4. Decision aids shall be maintained as to both technical standards and content for a period of 5 years after final acceptance of the deliverable by PCORI.
Key Personnel & Experience Requirements

1. The Contractor shall have a Project Director, with an MD or doctoral degree, and at least ten years expertise in health care communication and translation, interpreting clinical research findings, and with experience in leading large projects. The Project Director shall have sufficient time on this project to provide oversight and direction, and will be the person ultimately responsible for the entire project.

2. The Contractor shall have a Project Manager, with experience in health information translation and communication, clinical research, and in managing large and complex projects. The Project Manager shall have 100% full time equivalent (FTE) committed to management of the PCOR-TC. The Contractor shall demonstrate that they have sufficient additional management and administrative staff to efficiently support the operations of the PCOR-TC.

3. The Contractor shall demonstrate that they have personnel with expertise in health literacy, health communication, focus group and cognitive testing, qualitative research, meeting facilitation and stakeholder engagement, graphics and design, epidemiology, biostatistics, evidence synthesis/mapping, program evaluation, shared decision making and decision aids, computer decision support systems, and program implementation in clinical settings, and that these personnel have sufficient time allotted or available to the project to carry out the tasks in the Statement of Work (SOW).

4. The Contractor shall provide for a sufficient number of medical writers and editors for drafting and editing of key messages and written materials from research findings, and demonstrate that these personnel have sufficient time to carry out the tasks in the Statement of Work.

5. The Contractor shall demonstrate that they have access to consultation from clinical experts to review findings, provide clinical context, assist with message development, and provide input on dissemination strategies.
Project Management

The Contractor shall conduct the following activities:

1. **Identify points of contact and kickoff call.** On the effective date of the award (EDA), the Contractor shall provide PCORI staff with PCOR-TC staff contact information for responsible contacts for the center. Within 5 business days of award, the Contractor shall schedule a call with PCORI staff for a 1-2 hour call to discuss the goals, objectives, and tasks of the contract. The Contractor shall provide minutes within 2 business days of the call.

2. **Draft work plan.** Within 10 business days of award, the Contractor shall submit an updated work plan, subject to PCORI review and approval, detailing their approach to managing the scope of work, any changes from the contract proposal along with rationale for changes, and a detailed timeline.

3. **Kickoff meeting.** Within 4 weeks of award, the Contractor shall schedule a 4 to 8 hour meeting, including the Project Director and key program staff, with PCORI Program and PCORI Procurement Department staff. Although a face-to-face meeting is preferred, a webinar may be used for some or all of the PCOR-TC contract personnel with PCORI approval. The meeting will be for the PCOR-TC contractor to provide an introduction to project staff and to present a detailed plan of their goals for the center and their approach to performing the specific tasks, for PCORI input. The Contractor shall include in the meeting agenda:
   a. Overview of project tasks
   b. Invoice procedures
   c. Reporting Requirements
   d. Roles and Responsibilities
   e. Quality monitoring approaches
   f. Any initial deliverables
   g. Additional issues of concern.

4. **Final work plan.** Within 6 weeks of award, the Contractor shall submit a final work plan, updated in response to PCORI input on the draft plan and the kickoff meeting.

5. **Weekly progress calls.** The Contractor shall schedule and participate in weekly calls with PCORI staff. The weekly calls shall facilitate discussions on contrast tasks, barriers or problems affecting contract implementation, future tasks, and any administrative issues relevant to routine performance duties. The Contractor shall provide a preliminary call agenda one working day in advance of the call, and provide summary minutes and action items within 2 working days after the call.

6. **Interim progress reports with accounting of all projects and timelines.** The Contractor shall submit quarterly progress reports detailing project activities and milestones accomplished in the prior quarter.
7. **Revised work plan.** The Contractor shall submit a revised work plan annually, including any agreed upon updates and the details of remaining work.

Please see Table 2, Key Deliverables and Timeline, for additional information on tasks and timeline.

**PCORI Project Officer’s Authority**

Performance of work under this contract must be subject to the technical direction of the PCORI Project Officer 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.

1. Technical direction must be within the scope of the specification(s)/work statement.
2. Technical direction may be oral or in writing.

The PCORI Project Officer 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 causes an increase or decrease in the contract price, or the time required for contract performance;
3. Changes any of the terms, conditions, or specification(s)/work statement of the agreement;
4. Interferes with the contractor’s right to perform under the terms and conditions of the agreement; or
5. Directs, supervises, or otherwise controls the actions of the contractor’s employees.

**Period of Performance**

The period of performance for this RFP will be a three-year base period after the date of award with two (2) one-year options to extend by PCORI. The projected award date is June 24, 2016.

**Agreement Type**

PCORI expects to award a cost-reimbursable agreement. This agreement type provides an estimate of the work required to be performed over the agreement period. Contractors must be able to perform all activities described in the Statement of Work. PCORI encourages the use of subcontractors to ensure that project teams have the necessary expertise to accomplish the work.
Cost Reimbursable Agreements

The Contractor will be required to provide Technical Status Reports that describe (at a minimum) the technical progress per the requirements of the RFP. The frequency of these reports will be outlined in the RFP. 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 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 performance period. A technical status report will not be required for the period when the Final Report is due.
Key Deliverables

The Contractor shall provide/abide by the following deliverables and timeline provided in the table below.

Table 2. Key Deliverables and Timeline

<table>
<thead>
<tr>
<th>Deliverables</th>
<th>Deliverables Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milestone Negotiation</td>
<td>Day 0</td>
</tr>
<tr>
<td>Kickoff call</td>
<td>Within 5 business days of estimated date of award (EDA)</td>
</tr>
<tr>
<td>Draft work plan</td>
<td>Within 10 business days of EDA</td>
</tr>
<tr>
<td>Kickoff meeting</td>
<td>4 weeks of EDA</td>
</tr>
<tr>
<td>Propose TEP</td>
<td>4 weeks of EDA</td>
</tr>
<tr>
<td>Final work plan</td>
<td>6 weeks of EDA</td>
</tr>
<tr>
<td>Weekly progress calls</td>
<td>Ongoing weekly throughout project</td>
</tr>
<tr>
<td>Finalize TEP and invite members</td>
<td>2 months of EDA</td>
</tr>
<tr>
<td>Draft Templates for lay and clinician abstracts</td>
<td>3 months of EDA</td>
</tr>
<tr>
<td>Draft Template for Project Summaries</td>
<td>3 months of EDA</td>
</tr>
<tr>
<td>Final Templates for lay and clinician abstracts</td>
<td>4 months of EDA</td>
</tr>
<tr>
<td>Final Template for Project Summaries</td>
<td>4 months of EDA</td>
</tr>
<tr>
<td>Draft guidance language for PIs for preparing Project Summaries</td>
<td>4 months of EDA</td>
</tr>
<tr>
<td>Proposed Criteria for High Priority Projects for Dissemination</td>
<td>4 months of EDA</td>
</tr>
<tr>
<td>Draft lay and clinician abstracts</td>
<td>45 days after receipt of final research report</td>
</tr>
<tr>
<td>Draft version of Final Project Summary</td>
<td></td>
</tr>
<tr>
<td>Draft version of Peer Review Summary</td>
<td></td>
</tr>
<tr>
<td>Final lay and clinician abstracts</td>
<td>60 days after receipt of final research report</td>
</tr>
<tr>
<td>Final Project Summary</td>
<td></td>
</tr>
<tr>
<td>Final Peer Review Summary</td>
<td></td>
</tr>
<tr>
<td>Spanish versions of lay abstracts</td>
<td>20 days after final lay abstract</td>
</tr>
<tr>
<td>Revised Project Summaries for Newly Funded Projects</td>
<td>20 days after research award</td>
</tr>
<tr>
<td>Revised Project Summaries for Ongoing Projects, with &gt;1 year until completion</td>
<td>18 months of EDA</td>
</tr>
<tr>
<td>Propose Potential Priority Topics (first 10) with Statement of Rationale</td>
<td>6 months of EDA</td>
</tr>
<tr>
<td>Updated Lists of Priority Topics</td>
<td>12 months of EDA, then every 6 months throughout project</td>
</tr>
<tr>
<td>Nomination materials for Submission of Topics to AHRQ</td>
<td>2 months after topic selected</td>
</tr>
<tr>
<td>Convene stakeholders to inform dissemination plan proposals</td>
<td>TBD</td>
</tr>
<tr>
<td>Develop and implement selected dissemination activities.</td>
<td></td>
</tr>
<tr>
<td>Quarterly project reports</td>
<td>Ongoing throughout project</td>
</tr>
</tbody>
</table>
Acceptance of Deliverables

PCORI will review and provide comments on each deliverable within (5) 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 or the assigned PCORI Project Officer shall provide the Contractor with written acceptance or rejection (with specified reasons). The Contractor will have five (5) business days to complete and deliver changes made as a response to the PCORI’s comments. 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.
Proposal Evaluation Criteria

The Basis of Award will be Best Value. The cost reimbursable agreement will be awarded to the offeror whose quote, conforming to the RFP, 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 agreement to the responsible Offeror whose offer conforming to the RFP will be most advantageous to PCORI. An evaluation of the Offeror’s cost/price proposal 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 cost/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 cost/price is too high or too low may be considered in the context of comparison to other cost/price proposals as well as to the ICE, or to any other information the Procurement Office deems useful in their discretion. The cost/price reasonableness evaluation will result in a determination of what is fair and reasonable to PCORI.

Proposals for 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>40%</td>
</tr>
<tr>
<td>Organization and Staffing</td>
<td>20%</td>
</tr>
<tr>
<td>Project Management Plan</td>
<td>20%</td>
</tr>
<tr>
<td>Pat Performance</td>
<td>20%</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 Approach**

Submit a narrative that demonstrates that the Offeror has a full understanding of the requirements and has the overall capability and experience to provide the services and tasks described. Offerors must provide a detailed plan that includes a description of the proposed approach and a detailed draft project plan outlining the requirements in the Statement of Work. Describe what events or activities are envisioned, contacts and resources proposed to accomplish the tasks, and demonstrate how the proposed approach will accomplish the objectives of the PCOR-TC.

**Organization and Staffing**

Submit a narrative that addresses the Offeror’s organizational capability and staff qualifications to undertake the work required. Please include an organization chart with named personnel that demonstrate reporting lines and areas of responsibility. The description of Organization and Staffing shall describe the overall plan for organizing, staffing, and assuring accountability for 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.

Personnel proposed must demonstrate core expertise in the tasks anticipated. List proposed project team staff, identifying key personnel and their level of effort. For key personnel, devote one paragraph to identify the specific tasks in the Statement of Work for which they have responsibility, and link to their relevant experience. Describe how the individual expertise of each proposed team member and the combined, complementary expertise of the project team are appropriate for supporting each of the requirement sections of the RFP. If the use of subcontractors or consultants is proposed, clearly articulate their roles and demonstrate their relevant experience.

Résumés shall be provided in an appendix for the named key personnel and demonstrate experience in similar positions on prior projects/contracts that are similar and relevant to the scope and complexity contemplated.

**Project Management Plan**

The Offeror shall propose a comprehensive Project Management Plan. The Project Management Plan must give the 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 Statement of Work and requirements within this RFP. The Offeror is to demonstrate how it will perform all of the PCORI’s requirements, offered 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 similar to those outlined in this RFP. The 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 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 the 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, and corrective actions taken, etc.).
- Dollar Amount of Contract
- Duration (including Start Date, Completion date, both targeted and actual)
- Point of Contact, Telephone Number, and Current E-Mail.

**Cost/Price**

The offeror shall submit cost/pricing in accordance with the requirements of the RFP and in accordance with the Submission Guidelines (Volume 3). Since this will be a cost-reimbursable type of agreement, the ceiling amount will be established within the agreement.

When evaluating the cost/price proposal, a determination shall be made as to the reasonableness and the completeness of the cost/price proposal. PCORI shall use their cost/price analysis to determine whether the proposed prices are fair and reasonable. Cost/Price will not receive an adjectival rating.
<table>
<thead>
<tr>
<th>Color</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purple</td>
<td>Exceeds evaluation standards in a beneficial way; has a high probability of satisfying the requirement and has no significant weakness.</td>
</tr>
<tr>
<td>Blue</td>
<td>Meets and sometimes exceeds the evaluation standards and demonstrates a good understanding and ability to meet the PCORI’s requirements. There is little risk to PCORI and the Offeror demonstrates one or more strengths that will benefit PCORI.</td>
</tr>
<tr>
<td>Green</td>
<td>Meets evaluation standards and will satisfy the minimum requirements. Weaknesses are minor and can be readily corrected.</td>
</tr>
<tr>
<td>Yellow</td>
<td>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.</td>
</tr>
<tr>
<td>Red</td>
<td>Fails to meet minimum requirements and noted deficiencies require major revisions to the proposal in order to make the proposal acceptable.</td>
</tr>
</tbody>
</table>

**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 3 calendar days after receiving the award notification. If a debriefing is given to the requesting offerors, it will be conducted within 5 calendar days after receipt of the offeror’s request. PCORI will provide verbal or written debriefs.

Protests

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

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

**PCORI Rights**

Specific to the deliverables outlined in this RFP, the following should be noted: that PCORI will retain ownership of all work products, including templates, summaries, and other deliverables, produced under this Contract. In addition, as between PCORI and Contractor, PCORI will retain ownership and control over all materials of or provided by PCORI (e.g., peer review comments and materials relating to PCORI’s peer review process, summaries, abstracts, comments, and notes of researchers, stakeholders, and others related to the research).

**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; Columbus 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 Conflict of Interest and Personal Conflicts of Interest (COI)

The term “organizational conflict of interest” means that the Contractor (which term hereinafter shall be deemed to include its chief executives, directors, any consultants, 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 tasks;

(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 as he or she deems 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 Contractor employee, 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 Contract. 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
- Employee name (current and past employees)
- Employee company labor category
- Employee 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
Submission Guidelines

The purpose of this section is to provide guidance concerning the content and organization of this proposal. Award will be made to a responsive and responsible offeror who provides best value as identified in the Proposal Evaluation Criteria section. The offeror’s proposal is presumed to represent their best efforts in response to this RFP. Unexplained inconsistencies resulting from the offeror’s lack of understanding of the nature of the scope of work required to perform the contract may be grounds for exclusion from the competitive range.

For “Optional Task - Decision Aids”, Please prepare a separate technical and cost proposal to support this optional requirement. PCORI reserves to the right to act on this optional task after award.

- **Optional Task - Technical Proposal – Page Limit: 2**
- **Optional Task - Cost/Price Proposal – Page Limit: 2**

Submissions should be organized in three separate volumes: Administrative, Technical Proposal (Technical Solution, Organization & Staffing, Project Management Plan & Past Performance), and Pricing; these should be submitted as separate files. 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 may be included. We accept MS Word, MS Excel, and Adobe PDF formats.

Each volume shall consist of a title page, a table of contents, and the body. The title page shall contain the following information:

1. RFP Title
2. Name of Offeror
3. Date of Submission
4. Other applicable information as necessary.

The Offeror is advised that its offer, if accepted by PCORI, will form the basis of a binding agreement. Therefore, care must be taken to properly address the requirements set forth in the RFP. These instructions set forth requirements for preparation and submission of proposals and to establish format and specific content of each offer. This is to assure completeness and suitability for both evaluation purposes and the cohesiveness of the resulting agreement. Be sure that the proposal explains how your firm will fully satisfy all of the performance requirements of the intended agreement. Submit a complete proposal. Proposals that are not complete may be determined unresponsive and rejected.

Proposals should be sent electronically to RFP@pcori.org and fmceachran@pcori.org, Proposals not received by the time stated above will not be considered.

Questions must be submitted to rfp@pcori.org, referencing RFP# PCO-PCORTC2016 in the Subject line: Translation Center no later than 5:00 pm (ET) on April 18, 2016. Offerors shall submit proposals in response to this solicitation electronically as follows:
Volume 1: Administrative – Page Limit: None

Each submission must include a cover letter with following information:

- Offeror’s name and mailing address
- Reference to the solicitation (RFP) number PCO-PCORTC2016
- Technical and contract points of contact (name, phone number, and e-mail address)
- Business size (large, small, state/federal certifications—MBE, 8(a), HUBZone, etc.)
- Dunn & Bradstreet Number (DUNS)
- Federal Tax ID (EIN, TIN, SS)
- Affirmation that the proposal 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


2. Organization and Staffing – Page Limit: 5
4. Past Performance – Page Limit: 5

Volume 3: Pricing Proposal – Page Limit: 4

The written price proposal shall contain the following:

1. Offerors shall provide a rationale to explain the formulation of how they arrived at their proposed pricing by detailing labor categories, labor rates, travel labor rates, and the number of hours estimated to complete each service unit.
2. Volume 3 shall be no more than four (4) pages with no smaller than 11-point font.

Cost Reimbursable Agreements

Material, Other Direct Costs, and Travel will be reimbursed at cost (not additional fee). Offerors shall propose indirect rates applicable to Material, ODCs, and Travel. Indirect rates applicable to Material, ODCs, and Travel are also reimbursed at cost and shall be incorporated into any resultant agreement. No profit/fee shall be proposed. Materials, ODCs, and Travel shall not be allocated to subcontractors and/or other affiliates.
• 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.

• Any and all indirect rates must be fully supported with applicable documentation. The offeror shall identify the basis for the proposed indirect rates applicable to Material, Other Direct Costs, and travel (i.e., Forward Pricing Rate Agreement (FPRA), Negotiated Indirect Cost Rate Agreement (NICRA) Forward Pricing Rate Proposal submission, Approved Provisional Billing Rates, budgetary rates, etc.) and provide documentation supporting their proposed indirect rates. These documents are subject to verification and audit.

• The offerors shall provide their current (within the last twelve months) Forward Pricing Rate Agreement or Forward Pricing Rate Proposal submission for indirect rates, and/or Provisional Billing Rates approval letter for current-year indirect rates.

The offeror shall submit functional responsibilities and labor qualifications for each labor category under this RFP. Functional responsibilities shall include the principal duties to be performed by the labor category. Labor qualifications shall include experience and/or education requirements for all labor categories. In addition, the offeror shall provide a narrative outlining the rationale for the functional responsibilities and qualifications proposed for each category. The proposed labor qualifications will be incorporated into the resulting contract, thereby becoming the standards for use during performance of the effort. These labor categories shall be referenced in which the respective requirements align to their functional responsibilities.
Appendix A: 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, 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</td>
<td>Unable to provide a score.</td>
</tr>
<tr>
<td>Performance</td>
<td>E</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
<td>---</td>
</tr>
<tr>
<td>Past Performance (as applicable):</td>
<td></td>
</tr>
<tr>
<td>Technical quality of deliverables produced under the contract</td>
<td></td>
</tr>
<tr>
<td>Effectiveness of overall contract management (including ability to</td>
<td></td>
</tr>
<tr>
<td>effectively lead, manage and control the program)</td>
<td></td>
</tr>
<tr>
<td>Understanding the customer objectives and technical requirements</td>
<td></td>
</tr>
<tr>
<td>Contractor was reasonable and cooperative in dealing with your staff</td>
<td></td>
</tr>
<tr>
<td>(including the ability to successfully resolve disagreements/disputes)</td>
<td></td>
</tr>
<tr>
<td>The Contractor responded effectively to reviews of deliverables,</td>
<td></td>
</tr>
<tr>
<td>efficiently implementing needed revisions</td>
<td></td>
</tr>
<tr>
<td>Timeliness of submitting project deliverables</td>
<td></td>
</tr>
<tr>
<td>Contractor proposed alternative methods/processes that reduced cost</td>
<td></td>
</tr>
<tr>
<td>or otherwise benefited the customer</td>
<td></td>
</tr>
<tr>
<td>Ability to hire/apply a qualified workforce to this effort</td>
<td></td>
</tr>
<tr>
<td>Ability to adjust staffing to respond to needs of the project</td>
<td></td>
</tr>
<tr>
<td>Ability to meet or exceed small business and small disadvantaged</td>
<td></td>
</tr>
<tr>
<td>business goals set forth in the approved subcontracting plan</td>
<td></td>
</tr>
<tr>
<td>Rate the firm’s ability to deliver quality service in a timely manner</td>
<td></td>
</tr>
<tr>
<td>Rate the firm’s ability to meet contract requirements</td>
<td></td>
</tr>
<tr>
<td>Rate the firm’s adherence to contract schedules including</td>
<td></td>
</tr>
<tr>
<td>administrative aspects of performance</td>
<td></td>
</tr>
<tr>
<td>Were you satisfied with the company's performance?</td>
<td></td>
</tr>
<tr>
<td>Would you use them again?</td>
<td></td>
</tr>
</tbody>
</table>

Please discuss every 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 May 23, 2016 2:00 p.m. Eastern Time to: RFP@pcori.org, Subject: Translation Center