

PUBLIC INFORMATION & COMMUNICATION SERVICES (PICS)  
NIH - TASK ORDER

RFTOP#100

TITLE: NIH Director's Council and Public Liaison Support

**PART I – REQUEST FOR TASK ORDER (TO) PROPOSALS**

**A. POINT OF CONTACT NAME:** Anthony Revenis

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**B. PROPOSED PERIOD OF PERFORMANCE:** One year from task order award with 4 additional one-year options. October 1, 2002 through September 30, 2003 with four (4) twelve (12) month option periods.

**C. PRICING METHOD:** *Time and Material*

**D. PROPOSAL INSTRUCTIONS:** Proposal should be submitted by e-mail. Samples of previous work may be provided via e-mail or via U.S. mail postmarked NLT the response date of this RFTOP. Please enter in the subject line the following text, "RFTOP # - Proposal submitted by {Insert Firm Name}." A signed task order form (last page of the RFTOP) may be scanned and submitted or will be requested after source selection.

**E. RESPONSE DUE DATE:** September 9, 2002 *at 1:00PM Local Time*

**F. TASK DESCRIPTION:**

**F.1 PURPOSE**

The purpose of this task order is to provide communication, meeting, evaluation and administrative support for the COPR, the COPR Associates program, and

public liaison and outreach activities, in consultation with the Office of Communications and Public Liaison (OCPL) in the Office of the Director.

## F.2 INTRODUCTION

This contract will support the NIH Director's Councils, primarily, the Council of Public Representatives (COPR), a few ancillary activities of the Advisory Committee to the Director (ACD), the COPR candidate pool called COPR Associates, and public liaison and outreach activities and efforts.

The COPR and formal Public Liaison Offices (OPLs) were created in response to an Institute of Medicine (IOM) report recommendation to the National Institutes of Health that encouraged NIH to create more formal structures and processes for public input. This project is a highly visible undertaking for the Office of the Director.

Two of the NIH Director's responses to the IOM report were the development of the COPR and the creation of the Public Liaison Offices. Both the COPR and the OPL efforts have taken shape and have undergone significant growth since their creation three years ago.

The Director has met with COPR seven times, and in addition to the COPR activities, NIH has expanded the original recommendation to include a program called COPR Associates. The COPR Associates are all members of the COPR candidate application pool, but they are not formal COPR members. To date there are over 260 COPR Associates.

New priorities for the Director's COPR and the public liaison efforts for NIH include the implementation of additional proactive outreach initiatives and resources in coordination with the OCPL. This contract will also support these additional public outreach and liaison activities.

## F.3 SCOPE OF WORK

The Office of Communications and Public Liaison in the Office of the Director anticipates needing a broad spectrum of support and activities related to the COPR, a few ancillary activities of the Advisory Committee to the Director (ACD), and support of the COPR Associates program, and public outreach and liaison activities. The contractor will be responsible for the following:

### **F.3.1 COPR Selection Process:**

The contractor will be responsible for assisting in the process of screening, scoring, interviewing (by telephone), and ranking COPR applicants. Additionally, the contractor will be responsible for developing the promotion and distribution plan, training of contractor staff in interviewing and scoring methodologies;

assuring that processes are reliable through spot checks; and documenting all steps leading to selection of COPR members. One-third of COPR members will rotate off the Council each year. This selection process will occur every year and will include the replacement of about 5 to 7 new COPR members each year. Once every year, NIH will hold a formal “open call” for nominations in order to replenish the COPR/COPR Associate applicant pool. This “open call” for applications requires an extensive national outreach strategy. This “open call” should provide at least 65 and up to 200 possible new candidates for the COPR and COPR Associates. Forms mentioned below already exist. A database for tracking applicants thru the selection process exists.

- Send application package to those who request them (300 estimated).
- Post application on COPR web site.
- Participate in and/or assist in planning strategy sessions or meetings related to the recruitment and selection process.
- Develop tools and resources for the successful recruitment, selection, and/or retention of prospective COPR Associates and COPR members.
- Collect applications (65 up to 200 candidates estimated).
- Document process for tracking each application package received in COPR database.
- Update and maintain existing database to accommodate increasing amounts of data.
- Update and maintain web-site information to include current application and relevant selection information.
- Send acknowledgments of receipt to candidates for complete packages.
- Send notification to candidates with incomplete packages.
- Document security and quality assurance measures.
- Prepare Applicant Review Form and Scoring Summary for each candidate.
- Screen applications for eligibility; provide status report to OCPL. The OCPL has final authority for eligibility status.
- Score all eligible applications according to approved scoring instrument. Personnel must be trained to ensure adherence to scoring guidelines established by OCPL.
- Assess applicant pool for diversity; provide status report to OCPL.
- Enter all data in database (existing) for tracking and evaluation of candidates.
- Review all application packages determine if any information is missing, and collect it from candidates prior to scoring process.
- Help prepare and plan all arrangements for NIH Director’s Review Panel process. This includes the room, copies of applications, arranging travel (if needed) for selected reviewers and taking care of necessary logistics for the conduct of this review panel process.

- If needed, conduct telephone interviews of final pool of applicants, using approved instrument (10-20 individuals) with OCPL staff. Train all staff doing interviews (including OCPL staff). Record all interview results on approved forms.
- Incorporate results of interview into ranking of candidate.
- Prepare \_ page summary/rating for each applicant who meets the criteria (65-200).
- Develop matrices for reviewing different characteristics and information from applicants.
- Prepare roster of highly-ranked candidates for NIH Director, reviewing diversity (ethnic diversity, mix of ages, men and women, representation from the medically underserved, mix of skill types and expertise, mix of research/disease interests).

### **F.3.2 Meeting Planning and Support:**

**F.3.2.a:** Provide conference/meeting support for a minimum of a 2 day meeting (2-4 times a year).

- Perform a site survey and conduct facility negotiations; serve as liaison with the facility to make all arrangements concerning meeting rooms, AV and guest rooms. The preferred room is conference room 6 (because of technical capabilities) in building 31C, with another room for breaks and lunch.
- Make arrangements for (if necessary) catering services for breaks and lunch as directed by OCPL. (Spring and Fall, 18-22 attendees).
- Arrange for all audiovisual equipment/flip charts/supplies, felt tip markers.
- Prepare necessary conference materials such as slides, charts, etc., including reproduction and distribution of reports, background information and presentations.
- Arrange to get speaker materials at least 1 month BEFORE the meeting and mail these “advance” materials to COPR members.
- Make appropriate number of copies of all speaker hand outs and materials for the meeting.
- Contact any COPR member with disabilities (visual impairment) to ask if electronic copies of all speaker materials should be provided AHEAD of time.
- Provide needed support for web site information in connection with the meetings on the COPR and/or Office of Public Liaison web-sites.
- Serve as contact point for questions about meeting (prior to meeting).
- Prepare, reproduce and distribute meeting materials, prior to and during meeting including letters of invitation, agenda, logistics fact sheets, participant lists, background information, compile meeting folders/binders as directed.

- Prepare 21 logistics fact sheets showing location of hotel, transportation options, meeting site; send to participants (COPR members, any outside speakers, and key meeting participants).
- Prepare and place *Welcome Letter* in hotel room of all COPR members prior to each meeting along with shuttle information and menus of break food.
- Prepare 75-100 copies (as needed) of agenda from COPR staff person (or designee) for COPR participants, consumer-advocates and other meeting attendees.
- Prepare final roster of meeting participants, name tags, and tent cards.
- Prepare 50 copies of roster (public version without personal contact information.)
- 30-35 name tags (COPR members, COPR staff, OCPL staff, NIH Director and key staff, speakers, and designated participants).
- 20-30 tent cards for the table and surrounding seats (COPR members, NIH Director, speakers, COPR staff and designated participants)
- Provide registration/message handling support at the meeting, including monitoring sign-in sheet as required by Federal Advisory Committee Act (FACA) regulations for all attendees other than participants.)
- Provide recording support for the meeting including equipment and transcriber (tapes of proceedings will be collected by scribe and turned over to Project Officer after meeting summaries are complete).
- Provide science writer who will prepare meeting summary and minutes from the transcript according to instructions provided by OCPL, and in accordance with FACA regulations. The summary is due to OCPL staff 10 working days following the meeting. Revisions (up to 2 rounds) are to be made based on instructions from OCPL staff. COPR staff will get the minutes through the NIH approval process according to FACA regulations.
- Provide post-meeting support that includes written follow up, development of meeting action item lists, response to COPR requests for materials, and support of COPR working groups between meetings.

**F.3.2.b:** Provide conference/meeting support for a minimum of two (2) sub-group/work group meetings and a minimum of one (1) site visit and/or conference each year.

- Secure meeting space and pay, if necessary, for meeting location; serve as liaison with the facility to make all arrangements concerning meeting rooms, AV and guest rooms.
- Make arrangements for (if necessary) catering services for breaks and lunch as directed by OCPL.
- Arrange for all audiovisual equipment/flip charts/supplies, felt tip markers.

- Prepare necessary meeting materials such as slides, charts, etc., including reproduction and distribution of reports, materials and presentations.
- Arrange to get speaker materials 1 month to 3 weeks BEFORE the meeting and mail “ADVANCE” materials to COPR members.
- Make appropriate number of copies of speaker handouts and materials for the meeting.
- Contact any COPR member with disabilities (visual impairment) to ask if electronic copies of all speaker materials should be provided AHEAD of time.
- Provide needed support for web site information in connection with the meetings on the COPR and/or Office of Public Liaison web-site.
- Serve as contact point for questions about meeting (prior to meeting).
- Prepare, reproduce and distribute meeting materials, prior to and during meeting including letters of invitation, agenda, logistics fact sheets, participant lists, background information, compile meeting folders/binders as directed.
- Prepare logistics fact sheets showing location of hotel, transportation options, meeting site; send to participants (COPR members and any outside speakers).
- Prepare and place *Welcome Letter* in hotel room of all COPR members prior to each meeting along with shuttle information and menus of break food.
- Prepare copies of agenda from COPR staff person (or designee) for COPR participants, consumer-advocates and other attendees.
- Prepare final roster of meeting participants
- Prepare name tags for meeting participants.
- Prepare tent cards for meeting participants and speakers.
- Provide registration/message handling support at the meeting, including monitoring sign-in sheet as required by Federal Advisory Committee Act (FACA) regulations for all attendees other than participants).
- If necessary, provide recording support for the meeting including equipment and transcriber (tapes of proceedings will be collected by scribe and turned over to Project Officer after meeting summaries are complete).
- Provide post-meeting support that includes written follow up, development of meeting action item lists, and response to COPR requests for materials.

**F.3.3 Travel and Hotel Arrangements:** Prepare travel and hotel arrangements for COPR members and guests, adhering to all government regulations, including collecting receipts from meeting participants.

- Coordinate and, if necessary, pay for local and long distance travel (all ground and air transportation) for COPR meetings (25 people maximum: 2 days for spring meeting, but 3 days for up to 5-7 new COPR members for Orientation; up to 3 days for fall meeting with up to 7-10 COPR members participating in the GPRA meeting.) Planning for GPRA meeting is not part a part of this contract. ONLY hotel arrangements.)
  - Reserve block of rooms
  - Obtain OCPL approval for hotel contract
  - Send list of COPR members (and other participants) to the hotel
  - Provide a *Welcome Letter* to COPR members with shuttle details, etc., in hotel room upon arrival
  - Provide hotel with government Tax Exempt letter
  - Contact COPR members, providing them with appropriate telephone numbers and contacts (hotel, transportation, contractor emergency numbers)
  - Ensure hotel rooms confirmed for those staying
  - Reconcile hotel bill with COPR member activities
- Coordinate hotel logistics for ad hoc meetings, site visits, special events, or conferences for COPR members and other key meeting participants. (This is in addition to the regular COPR meetings each year.) These meetings might include various work group meetings, trainings, work shops, conferences and miscellaneous meetings. In addition, they might include COPR member participation in other NIH committees, panels, work shops or activities at NIH. Miscellaneous meetings – on average 16 person days per year (see above for tasks).
- Coordinate Travel logistics
  - Fax COPR travel itinerary to OCPL.
  - Arrange a shuttle for transportation between the hotel and meeting each day. Provide shuttle information to COPR members and OCPL staff and shuttle driver (Number of COPR members, driver and company name, telephone numbers, pick up/drop off information.)
  - Arrange needed transportation and taxi services for COPR members returning to the air port on the last day of the meetings

**F.3.4 Public Outreach and Liaison Activities:** Provide support for proactive public outreach and liaison activities, resources, events and efforts.

- Coordinate all logistics, including travel and hotel, for ad hoc meetings, site visits, special events, or conferences for public participants, and other key meeting participants. These meetings might include: various public liaison and outreach work group meetings, site visits, events, workshops, trainings or conferences. (Estimate less than 2 to 3/year.)

- Develop tools and resources for proactive outreach and liaison activities (this might include power point presentations, videos, databases, hand outs, visual aides, etc.).
- Participate in and/or assist in planning strategy sessions, trainings, work shops or meetings related to public outreach and liaison activities.
- Create and maintain web sites that enhance outreach.
- Develop and maintain listservs and/or databases of public members and constituency groups.
- Provide support for outreach events, public liaison conferences, work shops, trainings, and/or site visits (see meeting support above).

#### **F.4 DELIVERABLES**

##### **F.4.1 COPR Selection Process**

- Application Package, subject to approval by COPR Executive Secretary
- Letters of acknowledgment to candidates upon receipt of applications
- Letters notifying candidates of missing pieces in their applications within two weeks of receipt of application
- Scorer training: OCPL staff and contractors, at least 2 weeks to one month before COPR scoring and review process begins
- Scored applications with summary sheets due October/November
- Database to store applicant information
- Letters inviting Review Panel participants to participate in the COPR Selection Panel due mid-late September/October.
- Telephone Interviews, if needed, winter of each year – December/January
- Letter Thanking Review Panel participants within the week of the “official” announcement of the COPR members. (March)
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##### **F.4.2 Pre-Meeting Deliverables for Planning and Support**

- Secure meeting space (minimum of 2 meetings/year) 6 months to a year ahead of time
- Meeting summary (minimum of 2 meetings/year) within 2 weeks after the meeting
- Pre-meeting materials pre-pared one month to two months prior to the meeting including, but not limited to the following:
  - Draft letters of invitation, agenda and administrative letter to acceptances
  - Updated agendas
  - Updated participant lists and mailing lists
  - Development of attendee lists
  - Status report of meeting facilities, hotel accommodations, airline reservations and meeting registration
  - Meeting announcement, including Federal Register Notice and deadline
  - Pre-meeting mailings

- Arrange NIH campus cable and video taping of meeting through NIH-MAPB at least one month prior to the meeting (when needed or desired by TOM.)
- Some meetings may require the preparation and distribution of background materials and reports 2 weeks to 1 month prior to the meeting

#### **F.4.3 On-Site Meeting Deliverables:**

Provide the necessary on-site staff (a minimum of 3) for performing conference service functions the days of the meetings. These functions include, but are not limited to, the following: secretarial support, message handling, registration, information desk, audio-visual projection and/or recording, and transcription assistance. Provide set up of meeting materials day of the meeting: logistical packets, participant lists, biographical sketches, handouts, agendas, nametags, table tents, directional signs, and refreshments, etc.

#### **F.4.4 Post Meeting Deliverables:**

- Plan for prompt delivery of meeting transcripts (7 to 9 days after meeting), meeting summary (5 to 12 days after meeting), meeting minutes (10 to 14 days after minute taker gets transcript.)
- Update meeting web-site using past tense for meeting description and dates.
- Within 5 days upon receipt of the final approved meeting summary and/or minutes mail required copies to established mailing list.
- Thirty days following each meeting, and subsequently every thirty days until a meeting is closed out, the contractor will provide a status report to include:

- Status of payment of participants
- Status of summary and transcript
- Meeting expenses incurred
- Status of contract funds
- Within 1 week following each meeting, provide TOM with meeting files:
  - Background information
  - 2 sets of all meeting handouts and speaker handouts and materials
- Make sure TOM has all correspondence and meeting participant information in an electronic format.

#### **F.4.5 Travel and Hotel Arrangements**

- Travel orders, itineraries, expense tracking for members and guests
- Hotel arrangements for members and guests
- Transportation to and from the hotel and meeting each day for all COPR members

#### **F.4.6 Public Liaison and Outreach Deliverables**

- Database and/or list serves for public/constituency groups
- Outreach tools and resources
- Web site content and updates

### **G. EVALUATION FACTORS**

#### **G.1 Corporate Experience/ Past Performance (up to 65 points)**

- Demonstrated successful performance in executing a contract of this nature.

#### **G.2 Experience of Personnel (up to 20 points)**

- Documented experience, educational background and training, availability of the proposed project manager and the proposed staff along with their designated responsibility to the project.

#### **G.4 Cost (up to 15 points)**

**TO # NICS-100**

**TITLE: NIH Director's Council and Public Liaison Support**

**PART II - CONTRACTOR'S REPLY: CONTRACT #263-01-D-0 \_\_\_\_\_**

Contractor:

Points of Contact:

Phone-

Fax-

Address:

TOTAL ESTIMATED COST:

Pricing Method

TOTAL ESTIMATED NUMBER OF HOURS:

PROPOSED COMPLETION DATE:

FOR THE

CONTRACTOR: \_\_\_\_\_

Signature

Date

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**SOURCE SELECTION:**

WE HAVE REVIEWED ALL SUBMITTED PROPOSALS HAVE DETERMINED THIS FIRM SUBMITTED THE BEST OVERALL PROPOSAL AND THE PRICE/COST IS REASONABLE.

Billing Reference # \_\_\_\_\_

Appropriations Data: \_\_\_\_\_

(ATTACH OBLIGATING DOCUMENT IF AN ROC WILL NOT BE USED.)

RECOMMENDED:

FAX #

Signature - Project Officer

Date

APPROVED: \_\_\_\_\_

FAX #

Signature - Contracting Officer

Date

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**NIH APPROVAL -**

CONTRACTOR SHALL NOT EXCEED THE ESTIMATED LABOR HOURS OR ESTIMATED TASK ORDER AMOUNT WITHOUT THE WRITTEN APPROVAL OF THE CONTRACTING OFFICER & PICS COORDINATOR

APPROVED: \_\_\_\_\_

Signature -Anthony M. Revenis, J.D., NIH-PICS Coordinator

Date