

This RFTOP requires a number of attachments, please contact me at RevenisA@od.nih.gov to receive the entire RFTOP package.

**INFORMATION AND COMMUNICATION SERVICES
NIH - TASK ORDER**

RFTOP# **156** TITLE: NIA/ADEAR CLEARINGHOUSE

PART I – REQUEST FOR TASK ORDER PROPOSALS

A. POINT OF CONTACT NAME: Anthony Revenis

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B. PROPOSED PERIOD OF PERFORMANCE: One year commencing 1/1/04, with four additional one year options.

C. PRICING METHOD: Time and Material. See Attached Spreadsheet. You are required to submit the attached current staffing plan **EXACTLY** as it appears for cost comparison purposes. You will enter hourly prices for each line and a handling charge percentage that will be added to all pass-thru costs. If you believe a different staffing plan would be more efficient, you are strongly encouraged to submit an alternate proposal. Alternate proposals will receive strong consideration.

D. PROPOSAL INSTRUCTIONS:

We realize that it is a major commitment when a company decides to bid on a clearinghouse contract, and the commitment begins long before anyone answers an 800 number call, responds to an email, or sends out a publication. We have chosen to use the RF-TOP mechanism to streamline the procurement process for ourselves and those who wish to bid on the job. In the past, it was not unusual for companies to submit large multi-binder proposals. We hope that this procurement will be simpler and require much less paper. We cannot say strongly enough, **please read and follow the instructions**. Additional verbiage is unlikely to separate your effort from the other offerors in a

positive way. Canned or boilerplate language from old word processing files will not be considered helpful or responsive.

Your proposal should be organized by the evaluation factors. You should **not** provide an explanation of how you will accomplish each item in the statement of work. The detailed statement of work is included to help you price your proposal, and will be the work required in the final contract. We will use your previous success to judge your ability. For this reason, it is imperative that you fill out the corporate experience grid with care. The following list describes what we hope to see in each section of your proposal. The 60-page limit does not include the business proposal, and you are free to apportion the 60 pages across the other 3 factors as you wish.

Please submit one electronic and 2 print copies of your proposal. Electronic proposals shall be identified on the subject line of the email and by file name with the following text, "RFTOP# 156- Proposal from {insert your firm's name}, Item 1 of 3." A signed task order form may be electronically transmitted or will later be requested from the successful bidder.

- **Factor 1 Management Approach to this Contract**
- Identify the key challenges of operating the NIA Clearinghouses contract
- Describe how you will address these challenges
- Describe any special expertise you bring to this contract
- Describe where the NIA Clearinghouses will be located and specify the layout and space allocation

- **Factor 2 Key Personnel**
- Include up to 3 resumes for managers of the project
- Include proposed Staffing Chart (see Factor 4 for additional staffing information) organized by job category only, showing lines of authority, and estimated FTEs for each position proposed, for example Project Mgr (1), Info Spec (2.5), Distribution clerk (4). It is not necessary to specify the names or include resumes for non-key personnel.

- **Factor 3 Corporate Experience**
- Include completed Corporate Experience Grid (legal paper is ok for print version)
- Refer to the task in the SOW if you need clarification or if you're not sure what the abbreviated task items mean
- Include the tasks requested and estimate the percentage of the contract that was devoted to that or an equivalent task
- Use the other category for parts of the job that are not covered by the itemized tasks of the NIA Clearinghouses
- Each project total should equal 100 percent

- **Factor 4 Cost**
- Specifics of cost should be included only in the Business Proposal.
- For comparison purposes, please price the staffing exactly as is enumerated in the staffing section.
- Firms are invited to propose alternative staffing plans that are designed to improve cost and technical efficiencies

General Do's and Don'ts

Do Observe the Page Limit

The page limit for this procurement is 60 pages. Really. That includes everything—the chart, grid, resumes, management approach—even the samples! We suggest developing a web-based sample box that we can review. If we want to see the finished product after looking at the web version, we'll ask you for it. Samples provided in a web sample box will not count against the page limit. If you can't do a web sample box, what the heck are doing bidding this job???? We hate to threaten, but after 60 pages we may be tempted to stop reading.

Don't Stretch the Limits of Credulity

Please don't make the type so small or the margins so wide that a reasonably able middle-aged person needs a magnifying glass and an extra-wide computer screen to read your proposal!

Do Summarize

Your firm has already qualified for the task order. It's safe for you to summarize—even parts of resumes. Get it right, but do it briefly!

Don't Give Us What We Didn't Ask For

Please notice what we haven't asked for—an understanding of the problem or project, resumes for everyone who might work on the contract, step-by-step instructions for answering the phone, developing a publication, etc.

E. RESPONSE DUE DATE: Wednesday October 8, 2003 at Noon local NIH time.

F. TASK DESCRIPTION:

**National Institute on Aging Clearinghouse Services:
National Institute on Aging Information Center**

Alzheimer's Disease Education and Referral Center

I. PROJECT DESCRIPTION

The National Institute on Aging (NIA) is seeking an organization to provide all management, technical, logistical, and administrative services to operate the NIA clearinghouses, which include the NIA Information Center (NIAIC) and the congressionally mandated Alzheimer's Disease Education and Referral (ADEAR) Center. The NIAIC is responsible for disseminating aging-related health education and disease prevention information to a broad audience of the general public, mass media, physicians, researchers, health care workers, special interest groups, other government agencies, and service organizations. The ADEAR Center is a national resource center that provides accurate, timely information about Alzheimer's disease (AD), its consequences and potential treatments, research, and available services to physicians and other health professionals, patients and their families, and the general public.

II. BACKGROUND

The NIA was authorized in 1974 (PL 93-296), and since that time, the Office of Communication and Public Liaison (OCPL) has been responsible for planning and carrying out a legislatively mandated education program to "disseminate the findings of the Institute and all other relevant information which may assist all Americans, and especially the elderly, in dealing with the problems and understanding the processes associated with aging." The NIAIC supports information dissemination and outreach efforts of the NIA, principally those led by the OCPL.

The NIA initiated the ADEAR Center in response to a congressional mandate to disseminate information on research and services related to AD. The Omnibus Reconciliation Act of 1986 directed NIA to establish a center to gather, maintain, and disseminate information about AD and publish an annual summary of the latest information (P.L. 99-660, Part F, Section 951). The primary goal of the ADEAR Center is to serve as a national resource of information about AD. Other goals of the Center include: (1) maintaining national computerized databases of AD information and AD clinical trials and (2) preparing materials to communicate the nature of the disease, its symptoms, and appropriate methods of caring for and supporting patients and family members, as well as publications to assist health professionals and reach out to the general public and special populations.

The contractor will be responsible for the day-to-day management of both NIA clearinghouses under the direction of the NIA Project Officer.

III. GENERAL CONTRACTOR REQUIREMENTS

A. Technical Requirements

1. The contractor must understand the biomedical research community and the workings of the Department of Health and Human Services (DHHS) and the National Institutes of Health (NIH).
2. The contractor must understand NIA's mission and the Institute's mandates in the areas of public information, health education, and outreach.
3. The contractor must understand the function of the OCPL and the role the office plays in planning and carrying out a legislatively mandated education program for older people, their family members, the general public, mass media, physicians, researchers, health care workers, special interest groups, other government agencies, and service organizations.
4. The contractor must have the ability and expertise to respond orally and in writing in English and Spanish to questions about aging and AD, as well as sensitivity to and familiarity with special populations including AD patients, families, and caregivers.
5. The contractor must have experience working with intermediaries to develop contacts with professional and lay organizations, health and aging organizations, and other groups that can help accomplish the goals of the clearinghouses.
6. The contractor must be able to develop, implement, and maintain computerized systems to support the information dissemination and outreach activities of the clearinghouses such as inquiry tracking, inventory management, database management, and website management.
7. The contractor must have expertise in and familiarity with accessing medical literature, selecting and searching appropriate computerized databases, and capturing fugitive literature in the fields of aging and AD and related disorders.
8. The contractor must have knowledge and experience sufficient to abstract, index, and maintain subfiles on aging and AD for the Combined Health Information Database (CHID).
9. The contractor must have knowledge and expertise sufficient to adapt and communicate technical information on aging and AD research to diversified professional and lay audiences.
10. The contractor must have the capability to develop, implement, and evaluate health communication messages and promotional materials and campaigns. The contractor

also must be able to work in all types of media, including print, electronic, advertising, and display.

11. The contractor must be able to implement all aspects of conference planning and management.
12. The contractor must be knowledgeable about domestic and foreign mailing regulations of the U.S. Postal Service and the NIH.

B. Logistical Requirements

1. The contractor must have the facilities, equipment (including computer hardware and software), and resources to operate a national health resource center. The contractor is responsible for providing all equipment, furniture, supplies, and miscellaneous needs to operate the NIAIC and the ADEAR Center. All furniture and equipment must be in very good condition and coordinated as would be appropriate for a national organization.
2. The contractor must establish and maintain a fail-safe communication system with the public and the NIA OCPL by telephone, in writing, and using electronic communication methods. NIAIC and ADEAR Center users include researchers, health care providers, educators, Federal and State program officials, the public, and others.
3. The contractor must maintain the telephone services needed to operate the clearinghouses, including the toll-free telephone services (each with voice mail, a minimum 12-line capability, and toll-free TTY lines for hearing-impaired callers). The contractor also will provide additional backup telephone services when the clearinghouses' toll-free telephone numbers are promoted in the national media. In addition, the contractor will provide direct telephone service to enable the Project Officer to communicate directly with the Project Manager and project staff.
4. The costs for the toll-free number are the responsibility of the government. At the time of transition, the NIA will arrange for the transfer of the 800 numbers to the successful bidder. The contractor will be responsible for the local lines that the 800 numbers reside on, and all other telephone services including local service, all outgoing long distance, and any mobile phone services that are needed for the contract.
5. The contractor must provide 2 dedicated, high-speed fax machines, one for the NIAIC and one for the ADEAR Center, with faxback capability and appropriate backup.

6. The contractor must provide daily courier service, mail pickup, and delivery between the contractor's facility, the Project Post Office boxes, the OCPL, and the NIH mail facilities located at 301 North Stonestreet Avenue in Rockville, MD. The NIA OCPL is located on the NIH campus at Building 31, Room 5C27, 31 Center Drive, Bethesda, MD. The contractor will provide additional delivery services to other NIA facilities as required, including the Gerontology Research Center in Baltimore and the Gateway Building in Bethesda. The contractor will maintain the Post Office boxes for the NIAIC and the ADEAR Center located in Gaithersburg and Silver Spring, Maryland.
7. The contractor must maintain the clearinghouses within the Washington, DC, metropolitan area. The clearinghouses must include sufficient space for all clearinghouse activities, including a public reception area and a library. The contractor will provide a separate entrance for the NIAIC and the ADEAR Center so that visitors will not be routed through other offices or lobbies. The clearinghouses will be clearly identified with signs at or near the entrance and in the building lobby. Currently, the NIA Information Clearinghouses are located at 8630 Fenton Street, Fifth Floor, Silver Spring, Maryland 20910.

IV. SPECIFIC CONTRACTOR REQUIREMENTS

The major tasks of both clearinghouses are as follows:

1. Management
2. Database Development and Management
3. Information and Referral
4. Training and Quality Control
5. Communications Research
6. Product Development and Graphic Design Services
7. Outreach and Promotion
8. Meeting and Conference Support
9. Distribution, Inventory, and Warehouse
10. Transition Plan and Contract Closeout

Task 1. Management

The contractor will assume responsibility for managing all aspects of the NIAIC and the ADEAR Center operations.

1.1 Staffing Plan

The contractor must develop and submit a staffing plan that provides full support for the requirements of the contract. The plan will include an organizational chart for the proposed staff by job category (not by name) showing areas of responsibility and lines of authority. During the contract, the contractor will provide resumes to the Project Officer when staffing changes are proposed and obtain the Project Officer's concurrence before implementing changes.

The contractor will be responsible for submitting the following reports for each clearinghouse in accordance with the delivery schedule.

1.2 Monthly Reports

Monthly progress reports will contain an overview that highlights the most significant activities and describes opportunities, problems, or difficulties that arose during the preceding calendar month, as well as proposed solutions or steps taken to solve problems. The reports also will describe by task the contractor's accomplishments for that month. These reports will contain a publication activity and inventory report and current usage statistics including website statistics. The monthly reports will be submitted electronically to the Project Officer by the 12th business day of the following calendar month and will be made available on an extranet website (see 2.7 Extranet Website).

1.3 Annual Reports

Thirty days after the end of each contract year, the contractor will submit a short annual report that provides an overview of clearinghouse accomplishments during the year and summary data of all the major clearinghouse functions for the previous twelve months. These reports will include graphs demonstrating clearinghouse usage. They also will be submitted electronically and made available on the extranet website.

1.4 Final Reports

At the conclusion of the contract, the contractor will submit electronically to the Project Officer a final report that summarizes the activities and accomplishments of both clearinghouses for the entire contract period and include statistical summaries of major clearinghouse activities. Summary charts of the most important activities also should be included. The final report may include recommendations for future growth and direction.

1.5 Special Reports

At the direction of the Project Officer, the contractor will submit reports that describe clearinghouse activities or particular aspects of the NIAIC or the ADEAR Center. These reports may be requested for activities such as presentations, speeches, and briefings. In addition, the contractor will submit publication and promotion plans annually; detailed descriptions of these plans are found in Tasks 6 and 7. Three times each year the contractor will submit a list of contract accomplishments to be incorporated into the NIA Director's Status Report for the NIA Advisory Council meetings. The contractor also will respond to requests for data for the semi-annual commercial design and printing report as required by DHHS.

Task 2. Database Development and Management

The contractor is responsible for managing clearinghouse-related databases, including those that support the internal and administrative functions of the Centers as well publicly accessible databases. For example, the ADEAR Center currently participates in the Federally-supported Combined Health Information Database (CHID) Alzheimer's disease (AZ) subfile, as well as managing a searchable website, which includes a database of Alzheimer's disease clinical trials. The development of an Aging subfile is planned for this contract period and will conform to the requirements of the CHID subfiles.

The contractor will provide integrated online systems to facilitate the use of clearinghouse resources such as CHID, the aging and AD clinical trials databases, standard responses, resource directory, inventory, and the inquiry tracking system so they can be accessed easily and quickly by the information specialists. The contractor regularly will evaluate the current databases and systems, and should propose improvements, additions, and refinements to existing databases when technology or program needs make them necessary and desirable.

2.1 Combined Health Information Database

The ADEAR Center maintains the AZ subfile of CHID, which in April 2003, contained approximately 7,300 records. The CHID database, including the AZ subfile, is available at www.chid.nih.gov. The contractor will be responsible for maintaining and expanding this resource, which is used to respond to inquiries and develop materials. The contractor also will be prepared to work with the Project Officer to plan and develop an Aging subfile for CHID. In addition, the contractor will work with the Project Officer and the CHID Board on user guides and other resources that are meant to facilitate use of the CHID database by NIA staff and the general public.

The contractor will arrange for services with the CHID Technical Coordinator, including maintenance or transfer of the subfile, file updates, and storage. Each participant in CHID is responsible for paying its share of CHID costs, based on its subfile size. In April 2003, the fee was \$.70 per record per annum. These costs are paid from contract funds.

On a quarterly basis (or more frequently if required), the contractor will transmit error-free data of Project Officer-approved abstracts for the CHID Technical Coordinator to load onto the CHID website. The contractor must have staff capable of transferring data formatted to the CHID technical specifications for the Aging and AZ subfiles. The contractor will monitor the entries for accuracy and completeness.

2.2 Identification, Screening, and Acquisition

The contractor must be able to identify and continuously monitor the likely sources engaged in developing materials and information about aging and AD for health professionals, AD patients and their family members, and the general public. The contractor must identify aging materials, including those dealing with the problems and processes associated with aging, and AD materials including, but not limited to, those dealing with causes, course, diagnosis, risk factors, treatment, care, training, financing, and social and economic aspects of AD.

Using established policies and procedures, the contractor will screen materials to determine whether they are appropriate for acquisition and acceptable for entry into the NIA bibliographic databases. The ADEAR Center acquisitions policy statement is attached.

The contractor will attempt to acquire at least one complimentary copy of all materials to be listed in CHID. In addition to journal articles, other types of materials in the collection should include: books, reports, newspaper and magazine articles, films and other audiovisual media, posters, teaching aids, directories and catalogs, as well as materials not found in standard collections (for example, newsletters, unpublished conference papers and proceedings, research reports, brochures, training materials, etc.).

2.3 Abstracting, Indexing, and Retrieval

As part of the contractor's responsibility to develop, maintain, and expand the Aging and AZ bibliographic subfiles, the contractor will obtain or write abstracts that provide the potential user of the materials with an abbreviated, objective description of the contents. The abstract will contain the document's most important points and enable the reader to decide whether or not the entire article, report, brochure, fact sheet, etc., would be of value. The abstractors will write either informative or indicative abstracts depending upon the nature and content of the material.

The contractor will abstract and index up to 1,500 documents per contract year. The abstracts will be submitted to the Project Officer for review in batches of no more than 50 citations. Rejection of more than 10 percent of the abstracts submitted shall be considered unacceptable work.

2.3.1 Thesaurus

The contractor will develop, maintain, evaluate, and update a thesaurus of health terms for indexing and retrieving information for each NIA subfile, using the National Library of Medicine's Medical Subject Headings (MeSH) as the major indexing authority. New subject headings will be recommended to the Project Officer, and selected experts will be consulted as needed for the thesaurus development. The contractor will prepare an updated camera-ready copy of the thesaurus annually. The current AZ thesaurus is available at www.alzheimers.org/catalog/thesaurus.html.

The contractor will process all reference literature and materials for entry into the NIA subfiles of CHID. The contractor will maintain a computerized version of each NIA subfile at their location for immediate access to respond to inquiries and for special research studies.

2.4 Custom Searches

At the direction of the Project Officer, the contractor will provide custom searches of CHID and other medical literature for NIA staff members and selected others. At the direction of the Project Officer, custom searches also may be provided to health professionals and others who contact the NIA clearinghouses. In addition, the contractor will propose topics for the automated online search feature. The topics will be selected on the basis of the number of inquiries received on a particular topic, recommendations of the NIA staff, and the importance of the subjects. The final selections will be made by the project staff in conjunction with the Project Officer. The automated CHID searches will be made available in print format, if necessary. Sample automated searches are available at www.alzheimers.org/litsearchchid.htm.

2.5 Clinical Trials Databases

In conjunction with NIA program staff, the contractor develops, maintains, and revises the aging and AD records that are part of the National Library of Medicine (NLM)

www.clinicaltrials.gov database. The contractor will work with NIA staff and grantees to develop, maintain, evaluate, and promote the aging and AD clinical trials databases.

2.5.1 Aging Clinical Trials Database

The contractor will develop and maintain the aging clinical trials records that are made available to the public through www.clinicaltrials.gov. The first aging clinical trials were added to the NLM database in April 2003. We anticipate that an additional 15 to 20 NIA studies will be added annually, as well as trials sponsored by pharmaceutical and biotechnology firms. The number of additions will depend on the pace of scientific developments. The contractor will be responsible for systematically reviewing the accuracy of all records at least twice per year. In addition, the contractor will update the records as new developments occur. These updates could include the addition of new study sites, changes in protocols, completed recruitment, completed studies, and stopping of studies.

2.5.2 AD Clinical Trials Database

The contractor must maintain, evaluate, and promote the AD clinical trials data-base, which includes clinical trials sponsored and conducted by NIA and other Federal agencies. It also may include trials sponsored by pharmaceutical and bio-technology firms. The database is available on the ADEAR Center home page and by contacting the Center's toll-free number. The contractor is responsible for forwarding all AD trials to the NLM database of clinical trials. As of April 2003, the AD clinical trials database contains 20 individual trials, but we expect this number to change as scientific developments occur. The contractor will be responsible for systematically reviewing the accuracy of all records at least twice per year. In addition, the contractor will update the records as new developments occur. These updates could include the addition of new study sites, changes in protocols, completed recruitment, completed studies, and stopping of studies. A sample record is available at www.alzheimers.org/trials/.

2.6 Website

The contractor will conduct a variety of web-related activities, including maintaining, evaluating, expanding, and promoting the ADEAR Center website. The current ADEAR Center website is www.alzheimers.org. The contractor will:

- Design, produce, edit, and maintain NIA publications in HTML format and graphics files in the most currently used web formats.
- Provide image maps, scripts, and search tools to aid users.
- Maintain and expand the interactive online ordering system for publications to include links to related publications and clearinghouse services.

- Incorporate marketing plans to promote the NIA websites in the annual promotion plan.
- Obtain the necessary software, arrange for adequate space on a web server, and maintain domain name registration for the ADEAR Center website.
- Ensure that the ADEAR Center website remains accurate, up-to-date, and accessible at all times.
- Establish and maintain appropriate security measures to protect the integrity of the website, its contents, and related data files. A security plan should be incorporated into the proposal. The plan will be reviewed annually by the contractor and approved by the Project Officer.
- Establish and maintain links to NIA grantees and other Federal sources of AD information.
- Provide the means for users to submit feedback and inquiries through the ADEAR Center website, responding promptly to questions.
- Monitor ADEAR Center website traffic, identifying popular documents and types of users, and report this information in the monthly report.

2.7 Extranet Website

The contractor will develop and maintain a secure extranet website accessible to OCPL and clearinghouse staff members. Items on the extranet will include:

- Calendar of events/exhibits
- Publication and archive inventories
- Graphics library
- Clearinghouse reports, including the annual publications and promotion plans
- Documents in development
- Staff alerts & news of the week

The contractor will manage the extranet site and should propose additions and enhancements if they are desirable and funds permit.

Task 3. Information and Referral

The contractor will respond to written, electronic, and telephone inquiries received directly by or assigned to the clearinghouses by the OCPL. The contractor must have the ability to respond to both written and telephone requests received in English and Spanish. Information specialists must be knowledgeable about NIA publications and resources for inquiry response and distribution. Knowledgeable information specialists should be able

to provide accurate, current information about aging and AD to health professionals, patients and their families, and the general public.

Inquiries to the clearinghouses will range from simple questions that can be answered with a standard response to highly complex ones that require extensive research. The contractor will use standardized responses, NIA and ADEAR Center publications, CHID and other databases, medical textbooks, journals, and reference files to respond to inquiries. Requests for information beyond the scope of the contractor will be referred to the OCPL for assistance or response.

3.1 Inquiry Tracking System

The contractor will develop a computerized system to record and track all inquiries. At a minimum, the system should capture the type of requester, the geographic location of the requester, the nature of the inquiry, how the inquirer learned about the clearinghouse, how the inquiry was received, the response given, and referrals and/or publications provided. This system will be capable of adding names to mailing lists, when requested by callers and appropriate lists exist. Procedures should be in place to ensure the confidentiality of those who request information, and comply with the requirements of the Privacy Act. The statistical information recorded will be reported in chart and/or tabular form. An estimate of the unit cost of responding to inquiries also must be kept. The contractor will develop a system to store/delete computerized data when it is no longer actively needed. The contractor will maintain detailed statistics without personal identifiers that enable the Project Officer to conduct trend analyses and develop future plans. The computerized inquiry tracking system should be implemented as soon as possible after contract award, but must be ready to use 1 month after contract award. The contractor will comply with all privacy act regulations.

3.2 Standard Responses

Typically, the NIAIC and ADEAR Center respond to inquiries by using NIA publications and press releases. In addition, the information specialists use the *NIA Resource Directory for Older People* to refer callers to organizations that will be able to respond to their particular questions. The specialists refer to guidance provided by the Project Officer on previous calls and questions. Information specialists also consult CHID, the medical literature, and reputable web resources for more difficult questions. The NIAIC and the ADEAR Center maintain files of responses that have been used to answer past written inquiries. The contents of these files will be transferred to the successful contractor.

3.3 Written Inquiries

The contractor will respond to letters written directly to the NIAIC and the ADEAR Center, as well as letters forwarded from the OCPL and correspondence sent to other Government offices and directed to the NIA for reply. The NIAIC responds to an average of 1,500 written inquiries each month, and the ADEAR Center responds to an

average of 150 letters monthly. Written responses may be classified as standard, custom, or controlled.

3.3.1 Standard Written Responses

A file of previously developed responses will be transferred to the contractor after the award. As changes occur and new responses are needed, the contractor will compose and/or revise responses and submit them to the Project Officer for approval. The contractor will review the responses every 6 months or as needed and send new responses to the Project Officer for approval. All standard written responses should be completed within 3 working days of receipt.

Personalizing a standard response can satisfy many of the inquiries received by the NIAIC and ADEAR. Standard responses may be used to announce new publications to internal mailing lists such as the National Advisory Council on Aging and NIA staff or to alert individuals that their request has been back-ordered. Standard responses also are provided for those letters requesting information that can be found in existing NIA and ADEAR Center materials. The response will be publications and an enclosure card or form letter.

3.3.2 Custom Written Responses

Custom written responses are provided for written inquiries that cannot be answered with publications alone or a previously developed response. The contractor will respond to the concerns expressed in the inquiry, relying on previous correspondence, NIA and ADEAR Center publications, CHID and other databases, medical textbooks, journals, reference files, and previous correspondence.

Custom responses, which must be approved by the Project Officer, should be completed within 5 working days of receipt. In consultation with the Project Officer, inquiries designated "difficult to answer" will be given extended deadlines.

3.3.3 Controlled, Special, and Media Responses

Controlled responses are provided to letters originally addressed to the President, members of Congress, the Secretary of the Department of Health and Human Services, or other Government officials and forwarded to the NIA for reply. The contractor will respond to the inquiry, obtain Project Officer approval, and meet all deadlines specified in the directions from the NIH Executive Secretariat. The Project Officer and NIA staff will provide guidance, as needed, for letters that are highly technical, politically sensitive, or otherwise not routine. Publication requests from members of Congress or their staff are to be handled within 24 hours.

In addition, the contractor will prepare special requests such as speeches, talking points, proclamations, and other written materials as directed by the Project Officer. All requests

from the broadcast or print media must be referred to the Project Officer or designated OCPL staff member for reply.

3.4 Telephone Inquiries

The contractor will operate two toll-free telephone numbers – the NIAIC and the ADEAR Center – to respond to inquiries in English and Spanish about aging and Alzheimer's disease and related disorders. The NIAIC responds to an average of 5,000 telephone inquiries per month. The ADEAR Center responds to an average of 2,000 telephone inquiries monthly.

The telephone services will be staffed from 8:30 a.m. to 5:00 p.m. eastern time. The contractor will analyze call volume periodically to assess whether extending the phone service hours is needed. Outside regular business hours, the contractor will provide a recorded message indicating the Center's business hours and encouraging inquirers to call back during those hours or the option for inquirers to leave messages for the staff. The clearinghouse toll-free numbers will be used regularly in special promotions. The contractor will present a cost-effective strategy to handle fluctuations in call volume. For planning and budgeting purposes, the contractor should assume four special promotions for each clearinghouse annually.

3.4.1 Standard Telephone Responses

Information specialists will respond to telephone inquiries promptly, accurately, clearly, and courteously. Many NIAIC inquiries will be handled by sending NIA publications; some, however, will be answered using a combination of NIA publications, standard responses, CHID and other databases, and referral organizations. Most ADEAR Center inquiries will be answered using existing NIA and ADEAR Center publications, standard responses, resources from the CHID database, AD clinical trials database, and referral organizations listed in the ADEAR Center resource files. All telephone inquiries will be documented by a tracking system and responded to as soon as possible, but no later than 3 working days after receipt.

3.4.2 Custom Telephone Responses

Some inquiries may be too difficult for an information specialist to respond to immediately. The Project Officer and NIA staff will provide guidance, as needed, for calls that are highly technical, politically sensitive, or otherwise fall outside routine requests.

3.4.3 Congressional, Special, and Media Responses

The contractor will notify the Project Officer when inquiries are received from congressional staff. Clearinghouse staff will respond within 24 hours to any requests from congressional staff for information and/or publications. All inquiries from the broadcast or print media must be referred to the Project Officer or designated OCPL staff member for reply.

3.4.4 Bulk Order Responses

Upon receipt of requests for bulk publications, the contractor will verify the maximum quantity allowed by the inventory. In the event that a publication request exceeds the maximum number allowed, the request will be referred to the Project Officer for approval.

3.5 E-Mail Inquiries

To respond to e-mail messages, the contractor will rely on the NIAIC and the ADEAR Center standard responses, NIA and ADEAR Center publications, resources from CHID and other databases, referral organizations, medical textbooks, journals, reference files, and previous correspondence.

The contractor will respond to e-mail requests for publications, questions about aging from visitors to the NIA website, questions about AD from visitors to the ADEAR Center website, and e-mail requests sent to the NIA or the ADEAR Center directly. The contractor will provide staff to respond to inquiries of a technical nature that are generally sent to the Web Master. The contractor also will respond to inquiries forwarded from or through the Project Officer. Responses are classified as either standard responses or custom e-mail messages.

3.5.1 Standard E-Mail Responses

Electronic mail requests will be handled using the same procedures followed for written requests. Standard responses are provided for those e-mail messages requesting information that can be found in existing NIA or ADEAR Center materials. The contractor will monitor and respond to publication requests in e-mail messages and all orders received via the interactive online publications ordering system.

The NIAIC responds to approximately 300-400 e-mail requests per month, and the ADEAR Center responds to roughly 150-250 e-mail inquiries monthly. About 90 percent of the NIAIC e-mail requests are publication orders and 10 percent are custom responses. The ADEAR Center's e-mail is about 75 percent publication orders and standard answers directly from NIA material. The remaining 25 percent are custom responses. E-mail volume is expected to increase about 20 percent each year. Standard e-mail responses will be completed within 1 working day of receipt.

3.5.2 Custom E-mail Responses

The contractor will write a custom message addressing the concerns expressed in each e-mail inquiry that cannot be answered with a standard response or publications alone. Some inquiries may be difficult for an information specialist to respond to immediately. The Project Officer and NIA staff will provide guidance, as needed, for requests that are highly technical, politically sensitive, or otherwise fall outside routine requests. Custom e-mail responses must be submitted to the Project Officer for approval.

3.6 Referral

The contractor will use the online version of the *Resource Directory for Older People* (www.nia.nih.gov/resource/) as the primary tool for referring callers to organizations that provide information about research, treatment, and services. Resource organizations are defined as NIA-supported research centers, voluntary organizations, professional societies, private groups, health institutions, automated databases, libraries, Government organizations, and other clearinghouses that provide health information to the public and to health care and social service providers. The contractor will identify organizations for possible inclusion in updates and revisions of the *Directory*.

Task 4. Training and Quality Control

The contractor will be responsible for recruiting and training qualified personnel to respond to inquiries to the NIAIC and the ADEAR Center. The contractor also will be responsible for continuously monitoring, evaluating, and improving the services of the clearinghouses.

4.1 Training Plan

The contractor will design and implement a staff training program to ensure the effectiveness of each clearinghouse. This training program should include knowledge about DHHS, NIH, and NIA; the mission of the NIA; the role of the OCPL; and basic information about aging and AD and related dementias. The training also will include the operating policies and procedures of each clearing-house, computerized tracking systems, the NIAIC and ADEAR Center standard responses, materials available in various databases, and referral resources. Training in the subject of AD must include sources of information on symptoms, diagnosis, causes, disease progression, prevention of reversible dementias, treatment approaches, ongoing research, home care, respite care, and institutional care. In addition, staff will receive training in active listening skills and telephone techniques for handling distressed inquirers and difficult callers.

The training plan will be submitted to the Protect Officer upon award and implemented within 15 days of approval. An outline of the current training plan is provided in the attachments.

4.2 Initial Training

Prior to answering inquiries, all staff will satisfactorily complete the steps outlined in the training plan. As new staff members are hired, they also must satisfactorily complete the training program prior to interacting with callers to the NIAIC or the ADEAR Center.

4.3 Continuing Education

To maintain high quality responses to inquiries, the contractor staff will have continuing education training on a regular basis. At a minimum, this training will occur quarterly. Continuing education activities may include updates on developments in aging research,

publications, resources, information and referral resources, skills development, specific aspects of aging, Alzheimer's disease, research advances, and any other topics relevant to inquiry response. Contractor staff members are encouraged to attend NIA and NIH lectures and conferences that deal with relevant subject matter.

4.3.1 Keeping Current

In addition to continuing education activities, the contractor staff will regularly review current literature dealing with aging and AD and related dementias to ensure that their knowledge and response to inquiries are accurate and current.

4.4 Quality Control for Inquiry Response

All information specialists must complete initial training prior to responding to inquiries, and all new information specialists will receive careful supervision, including review of inquiry tracking records by contractor management personnel. The contractor will develop procedures to evaluate clearinghouse services to ensure that all inquirers receive courteous, accurate, and appropriate responses to their questions and that supplementary material is mailed in a timely fashion. Periodic assessment of staff performance is encouraged.

Task 5. Communications Research

The contractor must have the experience and ability to plan, develop, implement, and evaluate public and professional health education campaigns, including culturally-appropriate outreach to minority communities. The contractor must use state-of-the-art communications research techniques.

The NIA firmly believes in a comprehensive approach to campaign planning and development. The campaigns will target health professionals, the public and special populations, including AD patients and their families and minority groups. The Institute is particularly interested in the issue of health literacy, the use of technology to reach older audiences, and the information needs of a diverse and changing older adult population. The Institute also is keenly interested in learning how to reach those who are unaware of NIA products and services.

The contractor must be able to identify target audiences, create culturally-appropriate messages, develop useful and accessible products, work effectively in a variety of media, select channels that will reach the specific target audience, and use appropriate evaluation techniques during each phase of the process. It is expected that each clearinghouse will conduct one major health communications campaign (which will include promotion of the toll-free telephone numbers) per year and track the results.

Following sound health communication principles and practices as outlined in the current edition of *Making Health Communication Programs Work*, a guide developed by the National Cancer Institute, the contractor must be able to plan implement, and evaluate all

campaign-related activities, including background research, formulation of health messages, identification of target audiences, identification of specific measurable program goals and objectives, and evaluation of all aspects of the project. The contractor must have experience in designing, field testing, producing, and distributing campaign materials, including products for the public and health care providers. The contractor also must have expertise and experience in planning and implementing the activities to launch the campaign, promote materials to the target audiences through appropriate communication channels, and measure results.

5.1 Clearances and Justifications

Prior to the development of any communication research strategies, all required clearances and justifications for DHHS and NIH will be prepared in consultation with the Project Officer. The Department is a strong advocate of communications research. The contractor will submit communications research plans to the OCPL to be forwarded to the Office of the Assistant Secretary for Public Affairs, DHHS, for review and clearance.

Task 6. Product Development and Graphic Design Services

The contractor will plan, research, write, design, test, and produce publications and materials needed by the NIA, including multimedia presentations. The contractor will perform all editorial functions, draft clearances, develop appropriate graphic treatments, and assume responsibility for all tasks related to product development. The contractor will be asked to write and/or edit articles, pamphlets, brochures, newsletters, annual and congressional reports, fact sheets, technical publications, research highlights, directories, bibliographies, posters, promotional pieces, press releases, and announcements of new publications. Materials may be produced in English and Spanish.

At the present time, some printing jobs are done through the contract and some through GPO. In general, the NIAIC jobs are printed through GPO, and the ADEAR jobs are the responsibility of the contractor. This is due primarily to the differing funding sources currently being used to fund the NIA Clearinghouses. These arrangements may change when the new NIH business system is implemented, but until then we will continue to operate the way we do now.

The following tasks describe the activities that are required in the areas of product development and graphic design services. For pricing purposes, please cost out the following items in your business proposal:

NIAIC

2 Large publications

- similar to Aging Under the Microscope or Portfolio for Progress)
- approximately 8 and 11 x 11, 45 pages, 4-color
- print 50,000 copies

10 Age Pages

- ❑ similar to existing design
- ❑ 6 panels, 2-color
- ❑ print 50,000 copies

ADEAR

1 Large publication

- ❑ similar to AD Progress Report
- ❑ approximately 8 and 1/2 x 11, 45 pages, 4-color
- ❑ print 60,000 copies

4 Fact Sheets

- ❑ similar to existing design
- ❑ 8 panels, 2-color
- ❑ print 50,000 copies

6.1 Publications Plans

The contractor will prepare a publications plan for each clearinghouse at the beginning of each contract year. The publications plans will be developed in conjunction with promotion plans (see Task 7) and will include an assessment of the current publications, inventory status, as well as recommendations for developing new publications, revising and updating existing materials, and deleting titles from the inventory. The contractor will submit the first publication plans 60 days after contract award and at the same time in each subsequent year of the contract. The NIAIC publications plan will be developed in consultation with the Head of the OCPL Publications and Reports Cluster and will be based on the annual OCPL publications budget request.

6.1.1 Clearances

As part of the planning process, the contractor will draft concept clearances for each document or series of documents proposed in the annual publications plans. Each publication clearance will contain the information required in DHHS Form 615. A sample is available at: www.nih.gov/icd/od/ocpl/resources/pubclear.htm. The contractor also will draft clearances for outreach materials such as radio and television PSAs and print ads. The Project Officer is responsible for forwarding these documents to the Office of the Assistant Secretary for Public Affairs, DHHS, for review and clearance.

6.1.2 Marketing Plans

The contractor will develop and be prepared to implement an initial marketing and distribution plan for each new publication proposed. The contractor also will be responsible for evaluating each marketing activity to determine the success of each approach and to develop refinements and recommendations for future promotional activities.

6.2 Publications Quality Control

The contractor must have the ability to produce accurate, well-written and designed, error-free materials for the NIA. The contractor will develop an effective procedure to ensure the quality of materials received from all printers is of the highest quality.

6.2.1 Publications Tracking and Archive System

The contractor will develop a tracking and archive system for NIAIC and ADEAR Center publications. Given the number of publications and diversity of formats that the NIAIC, ADEAR Center, and OCPL manage, the contractor must maintain records of the status of each publication as it moves through the development process. After the publication is complete, the contractor will ensure that each publication meets each requirement as specified in the publications plan. This might include: HTML coding, web posting, Spanish translation, or other special treatments. The contractor will maintain a digital (or other state-of-the-art format) copy of the final version of each publication. It should contain all elements and specifications that might be needed for reprinting or reproducing the document.

6.3 NIAIC Publications

In conjunction with the OCPL staff, the contractor will assume primary responsibility for researching, writing, editing, proofreading, designing, and printing selected NIAIC publications. The materials will be clearly written, well-designed for the appropriate target audience, and visually consistent with existing NIA materials. All publications will be formatted for the NIA website.

6.3.1 *Age Pages*

The contractor will produce and print up to 10 new *Age Pages* of 8 to 12 panels each contract year. Samples are available on the NIA website at <http://www.niapublications.org>. The topics will be selected from the publications plan developed in consultation with OCPL staff.

The contractor will revise, update, and print up to 10 existing *Age Pages* of 8 to 12 panels each contract year. The topics will be selected from the publications plan developed in consultation with OCPL staff.

The contractor will translate new and revised *Age Pages* into Spanish as they are produced. Samples of Spanish *Age Pages* are available on the NIA website listed above. In addition, the contractor will develop and maintain a tracking system to monitor the progress and status of each *Age Page* to ensure that the latest versions are available on the web and in print.

6.3.2 Outreach Materials

The contractor must be able to conceive, develop, and produce creative materials to promote the NIAIC to its designated target audiences. These materials must demonstrate an understanding of planned communication strategies and must be integrated into the promotion plan (see Task 7). Basic promotional materials will include a rolodex card, a brochure describing NIAIC services, and a publications list. Other outreach materials might include flyers, radio and television PSAs, and print ads.

An NIAIC brochure will be prepared in both English and Spanish. Other Spanish-language promotional materials will be prepared at the direction of the Project Officer. Special promotional materials will be developed when they are needed and it is cost effective to do so.

6.4 ADEAR Center Publications

In conjunction with the Project Officer, the contractor will assume primary responsibility for suggesting, researching, writing and editing, and printing all ADEAR Center publications. The materials will be clearly written, well-designed for the appropriate target audience, and visually consistent with existing ADEAR Center materials. All publications will be formatted for the ADEAR Center website.

6.4.1 Fact Sheets

The contractor will produce and print up to 4 fact sheets of 8 to 12 panels each contract year. The topics will be selected on the basis of the number of inquiries the Center receives on a particular topic, recommendations of NIA staff, and the importance of the subject. The final selections will be based on the annual publications plan and approved by the Project Officer. Samples of ADEAR fact sheets are available at www.alzheimers.org.

6.4.2 Quarterly Newsletter – *Connections*

The contractor will produce, print, and distribute the ADEAR Center's quarterly newsletter, *Connections*. This 12-page update alerts users of the Center to research advances, new publications, upcoming events, and other pertinent information. The contractor is responsible for planning, writing, and commissioning articles; performing all editorial functions (for example, technical editing, copyediting, and proofreading); preparing appropriate graphics; and performing all other tasks necessary for the final production and distribution of *Connections*. The Project Officer will review the newsletter at each stage of production. Samples of recent issues are available at www.alzheimers.org/pubs/conindex.htm.

6.4.3 *Progress Report on Alzheimer's Disease*

The contractor will compile and write the annual NIA *Progress Report on Alzheimer's Disease*. This document highlights recent results in AD research conducted and supported by the NIA and other NIH Institutes. The contractor is responsible for writing and performing all editorial functions (for example, technical editing, copyediting,

and proofreading) and for collecting and editing submissions from other NIH Institutes. The contractor also is responsible for designing the final document and preparing it for printing. The Project Officer will review all materials at each stage of production. Samples of recent reports are available at www.alzheimers.org.

6.4.4 Outreach and Promotion Materials

The contractor will conceive, develop, and produce creative materials to promote each clearinghouse to its designated target audiences. These materials must be integrated into the promotion plan (see Task 7). The materials must demonstrate an understanding of the principles of social marketing and planned communication strategies. Basic promotional materials will include a rolodex card, a brochure describing ADEAR Center services, and a publications list. Other outreach materials might include flyers, radio and television PSAs, and print ads. Materials may be prepared in both English and Spanish. Special promotional materials will be developed when they are needed and it is cost effective to do so.

6.5 Exhibit Development and Maintenance

The contractor will develop the components of a successful exhibit program for both the NIAIC and the ADEAR Center.

6.5.1 Large Exhibit

At the beginning of the contract, and annually thereafter, the contractor will evaluate the appropriateness, effectiveness, and physical condition of the NIA exhibits and make recommendations to the Project Officer about their findings.

The contractor will complete all aspects of redesigning the NIA exhibits if needed, including conceiving an idea, graphic design, text development, and all other activities needed to support exhibit development and production. For planning purposes, the contractor should assume that one new large exhibit for each of the clearinghouses will be needed over the life of the contract.

6.5.2 Tabletop and Temporary Exhibits

Tabletop exhibits will be used for small meetings and when the large exhibit is in use or transit. The contractor will evaluate the appropriateness, effectiveness, and physical condition of the NIA tabletop exhibits annually and make recommendations to the Project Officer about their findings. The contractor will complete all aspects of redesigning the NIA tabletop exhibits if needed, including conceiving an idea, graphic design, text development, and all other activities needed to support exhibit development and production. For planning purposes, the contractor should assume that one new tabletop exhibit for each of the clearinghouses will be needed over the life of the contract.

Task 7. Outreach and Promotion

The contractor must be capable of promoting and tracking the outreach activities of the NIA clearinghouses on an ongoing basis. Such efforts include strategic planning to reach

out to defined target audiences, identifying and contacting potential clearinghouse users through informational materials, attending key meetings and conferences, distributing descriptive materials to individuals and trade publications, providing monthly clippings of NIA promotions, and carrying out other outreach and promotion activities in English and Spanish, including developing radio, TV, and print PSAs when the budget permits. The costs of PSAs should not be included in this budget. For planning purposes, the NIA OCPL currently subscribes to Burrelle's Information Services for clippings and will continue to pay for this subscription directly.

7.1 Promotion Plans

The contractor will develop, write, and submit an annual promotion plan for each clearinghouse. Each plan will identify target audiences and outline specific plans for promoting awareness of the products and services of the NIAIC and the ADEAR Center. It is expected that five special promotions will occur annually. The promotion plans will be written in conjunction with the publications plans (Task 6). The first promotion plans will be submitted 60 days after contract award and at the same time in each subsequent year of the contract.

7.2 Conference and Exhibit Attendance

The contractor will identify national professional conferences and meetings on aging, AD, and public-health related topics and establish an appropriate exhibit schedule for approval by the Project Officer. The schedule will include meeting, date, location, display plans, estimated cost of meetings, and goals and/or benefits of attending. The proposed exhibit schedules will be submitted as part of the initial promotion plans and submitted annually thereafter. The contractor will maintain an extranet "calendar of events" with meeting dates, locations, and staffing opportunities. For planning purposes, the NIAIC exhibits at 10 meetings per year, and the ADEAR Center exhibits at 7 meetings annually.

The contractor will register NIA for the selected meetings, select and arrange for space, handle all logistics (i.e., ordering furniture and equipment), pay exhibit and other fees, set up and take down the exhibit (or make necessary arrangements), arrange for publication and exhibit return at the close of the meeting, and pay costs of contractor staff travel and of transporting materials to and from each meeting. The contractor will box, pack, or crate the publications and materials to ensure damage-free arrival. The contractor will ship the publications and confirm their arrival prior to the meeting. The contractor will staff the ADEAR Center exhibit except when the Center submits only materials for display. Staffing for most out-of-town NIA exhibits is handled by OCPL staff.

The contractor also will support information dissemination efforts in the metro Washington, DC, area. The contractor will deliver publications and exhibits to local events designated by the Project Officer. The NIA will notify the contractor of the event, which publications to deliver, and when to pick up the remaining publications and

exhibits. The contractor will be able to respond to these requests within 48 hours. The contractor also will staff meetings and health fairs in the metro Washington area.

7.3 Mailing Lists

The contractor will compile and maintain up-to-date, accurate mailing lists. Sample mailing lists include representatives of key intermediary groups and designated target groups, media, newsletter subscribers, NIA senior staff, and NIA advisory council members. Currently, there are approximately 10,000 entries in various categories. The NIA Clearinghouses subscribe to Burrelle's Media Directory for mailing lists for special events, programs, and outreach efforts.

The contractor will add, update, modify, or delete entries as a result of the inquiries received, or as directed by the Project Officer. Mailing lists will be maintained on a database that permits sorting by identifier codes, zip codes, organizations, interest groups, etc. The contractor will correct the mailing lists on an ongoing basis and will update the entire list annually. The objective will be at all times to maintain highly accurate lists.

7.4 Intermediary Liaison

To maximize promotion efforts, the contractor will work with groups and organizations in the field of aging and Alzheimer's disease to develop, maintain, and foster beneficial relationships. In consultation with the Project Officer, the NIA clearinghouses will work with representatives of designated target audiences to promote the NIA and its products and services.

7.5 Press Release Archive

The contractor will maintain an archive of all press releases. Copies of each NIA release will be kept in electronic versions that are organized by year and can be printed on demand. The contractor will receive previous archives at the award of the contract. The contractor will maintain and store past books for historical purposes. The press release archive may be proposed as part of the extranet.

7.6 News Clippings

The OCPL monitors the press activity and coverage of its researchers and grantees through magazine, journal, and newspaper articles. The OCPL subscribes to Burrelle's Information Services, and this cost is not part of the contract expenses. Beginning September 1, 2003, OCPL will be using Burrelle's web-based clipping services. Selected contractor staff will be authorized users of OCPL's account. The contractor is encouraged to suggest new and improved ways of presenting the data to suit OCPL's needs. Historically, the contractor has created and maintained monthly and annual clippings notebooks. The notebooks are tabbed and sorted by release, and the contractor provides a monthly count of the number of clips that each release generates. This data are incorporated into the next monthly report and summarized in the annual report. The

book is circulated at OCPL on the 15th of each month and will be returned to the contractor.

7.6.1 Special Compilations

The contractor will provide special compilations of the NIA news clippings for the NIA Advisory Council, which meets 3 times per year. Additional special compilations may be requested for exhibits and other special events.

Task 8. Meeting and Conference Support

The contractor will handle all meeting and conference logistics. The contractor will provide a range of services for meetings required by this contract.

8.1 General Meeting Support

The contractor will assist in all pre- and post-meeting planning, including estimating costs, making travel and facilities arrangements, providing on-site logistics and recording, preparing an agenda and materials, producing and distributing materials to participants in advance of the meeting. The contractor will submit the minutes to the Project Officer within 10 working days of the meeting, and mail the minutes to participants promptly after review. Within 10 days of each meeting, the contractor will prepare travel vouchers; reimburse participants for travel, per diem (as allowed by Federal travel regulations), and honorarium; and invoice the Government through the contract. For planning purposes, the contractor should assume one national meeting each year with 15 invited participants.

8.2 NIA Advisory Council Support

The contractor will provide a range of services for meetings convened by the NIA. Primarily, the contractor will provide support for the National Advisory Council on Aging meetings 3 times per year. At the request of the Project Officer, the contractor will draft a report of recent accomplishments, new publications, and other items of interest to be included in the NIA Director's Report. The contractor also will provide the notebook of NIA news clips (see 7.6.1), organize a display of new publications, and pick up remaining publications at the end of the meeting.

Task 9. Distribution, Inventory, and Warehouse

The contractor will be responsible for distributing, tracking, and warehousing all NIA publications and ancillary materials such as exhibits, videos, and materials archived from previous contracts. The contractor will provide the labor, facilities, and equipment necessary to securely store and efficiently distribute NIA materials.

The contractor will implement a computerized inventory control system to manage the publication receipt, storage, and distribution function of the clearinghouses. A current publications inventory for each clearinghouse will be available on the extranet and

incorporated in the monthly progress report. The summary report of the previous 12 months will form the basis of the annual reports.

The current inventory consists of approximately 110 NIAIC titles and about 125 ADEAR Center titles. More than 3 million publications are stored in roughly 10,000 square feet of warehouse space. The NIA publications and any other property will be transferred upon award.

The contractor will provide daily courier service, mail pickup, and delivery between the contractor's facility, the Project Post Office boxes, the OCPL, and the NIH mail facilities. The contractor will provide occasional additional delivery services to other NIA facilities as required, including the Gerontology Research Center in Baltimore and the Gateway Building in Bethesda. The contractor will maintain the Post Office boxes for the NIAIC and the ADEAR Center.

9.1 Inquiry Response Mailings

The contractor will mail materials and publications in response to requests from inquirers. This distribution will include bulk as well as individual mailings. All outgoing mail will be delivered to the NIH mailroom. Completion of U.S. Postal Service forms is the responsibility of the contractor. Postage for routine mailings and order fulfillment will be paid by the NIA and will not be billed to the contract.

9.2 Special Distributions

The contractor also may be asked to mail pamphlets, brochures, press releases, kits, special bulletins, and other items not normally stocked in the warehouse. The contractor will provide local pickup and delivery of these NIA materials through the NIH mailroom. Postage will be paid by the NIA.

9.2.1 Press Release Mailings

The contractor will be responsible for distributing NIA press releases. The contractor will duplicate, fold, label, and stuff envelopes. For planning purposes, press release mailings can be expected to occur 25 to 30 times each contract year to a mailing list ranging from 500 to 2,000 names, but averaging 400 names. Such mailings must be completed within 3 working days from receipt of a single copy of the release. These mailings will be delivered to the NIH Mail Room in Rockville. The NIA will pay the postage for these mailings. Increasingly, the OCPL is making fax and electronic mailing a standard way of reaching the media. The contractor may be asked to propose and implement improvements in the distribution of media mailings. Press releases also will be posted on the NIA and ADEAR Center websites and e-mailed and faxed to an electronic mailing list.

9.2.2 ADEAR *Connections* Mailing

The contractor will label and mail each issue of *Connections* to Center users (4 mailings per year to an estimated 7,000 names). The contractor will use the NIA postage permit for mailing *Connections*. The contractor also will send a quarterly e-mail alert to an “on-line mailing list” of approximately 2,000 users.

9.2.3 Video Mailing

The contractor will manage the NIA video library and will handle requests for videos in the NIA collection. The contractor will maintain an inventory of NIA’s videos and will monitor and report on video library usage in the monthly report; for example, what organizations are requesting the videos.

9.2.4 Other Mailings

Occasionally, the contractor will be requested to undertake other special mailing activities at the direction of the Project Officer.

9.3 Cost-Recovery Plan

The NIAIC and the ADEAR Center are authorized to collect funds for services and products approved in advance by the Contracting Officer and the Project Officer. Within 60 days of contract award, the contractor will review previous cost-recovery and cost-reduction activities and propose effective cost-recovery and cost-containment strategies and practices for review and approval by the Project Officer.

Both the NIAIC and the ADEAR Center currently support an active cost-recovery program and are expected to continue to do so. The NIAIC currently recovers the cost of producing *Exercise: A Video from the National Institute on Aging*. The items in the ADEAR Center cost-recovery program are listed on the publication ordering form at www.alzheimers.org. The contractor will review the current program annually and recommend additional products that may be included in the program.

Fees for services and/or products will be established at the recommendation of the contractor and with the approval of the Project Officer. Income from products and services will be accounted for separately in each monthly financial report prepared by the contractor and will be used to offset payments due to the contractor. A separate auditable account will be maintained for funds control.

9.4 Inventory

The contractor will store all designated NIA equipment and printed materials. When possible, the contractor will receive notice from the printer in advance of delivery of new publications. However, the contractor should always be prepared to receive publications without prior notification. Upon arrival of publications, the contractor will receive, unload, and warehouse new and reprinted publications. The contractor will verify the accuracy of the delivery ticket and report any discrepancies between the number of publications expected and the actual shipment received to the Project Officer.

As part of the inventory of publications, the contractor will develop a shipment receipt record, which will be completed whenever publications are received. This form will include the name of the publication, the quantity received, the publication number assigned, the location of the publication, and its condition upon receipt. The contractor will enter all information about the publications into the inventory database. The Project Officer will be notified by e-mail when new publications arrive. Fifty copies of the publication should be sent to the Project Officer on the next delivery unless otherwise requested.

On an annual basis, the contractor will hand count and verify the number of publications currently held in the inventory, and reconcile the physical count with the inventory database and reports. The Project Officer will be notified when the reconciled inventory report is available on the extranet.

9.4.1 Archives Inventory

At contract award, the contractor will receive the NIA archival files for maintenance and storage. These are internal files of historical publications, artwork, and audiovisual materials. They will not be used for general inquiry response. However, OCPL and other NIA staff may need to locate materials from the archives. Therefore, the contractor will develop and maintain a record of audiovisual materials, artwork, and archival documents. It is expected that many of the 'new' archive files will be digital, and the contractor is encouraged to propose more technically advanced ways of preserving and storing historical records. The contractor will develop an archives request form to be used when OCPL staff request documents, artwork, or audiovisual materials from the archives. This form will be submitted 30 days after the award and implemented after Project Officer approval. The following materials will be incorporated into the archival files:

- Audiovisuals—videotapes and audiotapes documenting activities of NIA staff, scientists, and grantees. They include video news releases, background video, public service announcements, and recordings of television and radio appearances. The sizes and formats vary widely.
- Artwork—negatives, artboards, linotypes, bluelines, CDs, and other forms of artwork that have been used to print NIA and ADEAR publications.
- Documents—publications developed and printed by NIA and ADEAR from previous years. The contractor will reserve 10 copies of each new publication to add to the archives.

9.4.2 Publications Display

The contractor will be required to stock the NIA publication displays located in the NIA hallways of Building 31C. The contractor will ensure that these displays are supplied with up-to-date publications, well stocked, and neatly arranged. The contractor also will provide a supply of publications for the OCPL office as needed.

9.5 Warehouse

It is estimated that, while the number of titles and inventory of each title are expected to vary over the life of the contract, 10,000 to 12,000 square feet of storage space will be required. The warehouse should be well lit with publications clearly marked and stored. The contractor will make all arrangements necessary for climate conditions, fire safety, and security. The contractor will acquire replacement insurance for NIA publications and equipment against damage such as fire, flood, and theft.

Task 10. Transition Plan and Contract Closeout

At the end of this contract, the contractor will cooperate fully with the successor contractor and participate in meetings and/or telephone conversations in which current procedures and activities are discussed in detail. The primary goal will be to ensure smooth and orderly transition with minimum disruption of clearinghouse services. The transfer will include relocation of the FTS2000 telephone lines, assumption of responsibility for the NIAIC and ADEAR Center Post Office boxes, and transfer of responsibility for the ADEAR website.

10.1 Transition Plan

At the end of the contract, the contractor will develop a detailed plan to transfer to NIA or to the new contractor, as directed by the Project Officer, all NIA materials. These materials will include items such as reference and program files, existing databases, software, and equipment that are integral to the operation of the clearinghouses. Where appropriate, these items will be packed in new boxes of uniform sizes, each labeled with a unique number, and delivered along with copies of an inventory showing the contents of each box in accordance with the delivery schedule. As part of the transition, the new contractor will conduct a complete inventory of NIA publications, equipment, artwork, and audiovisual materials to confirm an accurate count. The contractor will submit this property inventory to the Project Officer 60 days after the contract award.

10.2 Transfer of 800-lines

The government will arrange for the transfer of the FTS2000 toll-free lines. These arrangements will be included in the transition plan, and coordinated with the new and existing contractors.

G. EVALUATION FACTORS

Proposals will be evaluated according to the following evaluation factors. It is important to understand the instructions for this task order contract, and to follow them as closely

as possible. Offerors will not be penalized for short, thoughtful, and responsive proposals. Companies who submit large, boilerplate efforts risk being hoisted on petards, boiled in oil, and other dire consequences.

Factor 1

Management Approach to this Contract (25 percent)

The operation of the NIA Information Clearinghouses represents a number of challenges, and will require a good bit of thinking and management skill to operate rationally and in a cost-effective manner. Therefore, the offerors will be evaluated on their ability to present a sound and thoughtful approach to the challenges that are specific to this contract. For pricing purposes, we have included a detailed statement of work that specifies the tasks that the successful offeror must accomplish. Please do **not** develop an approach for each task. Your corporate experience grid will provide the necessary confirmation that you know how to accomplish the steps needed to do the job. There is no need to include an understanding of the scope of the problem or project for this RFP. Failure to follow instructions will lead us to question your ability to manage this contract. Again, canned or boilerplate management approaches or sections are not responsive and are unwelcome.

Factor 2

Key Personnel (25 percent)

We want to see resumes for up to 3 people that you propose to have administrative responsibility for the contract. These may be current staff members or contingent hires. Please do not include corporate officers as key personnel, unless a substantial majority of their time will be spent administering the contract. Also, please do not include resumes for other contingent hires or potential subcontractors.

Please do include an organization and staffing chart for the NIA Clearinghouses with the names of the key personnel, but do not include the names of other staff on the chart just the job categories. The chart should reflect your best approach to organizing the staff for the NIA Clearinghouses to achieve an appropriate and cost-effective contract. This chart may either use the current staffing of the contract or your proposed alternative plan (see Factor 4 in the proposal instructions section). Please use job categories such as information specialist, outreach coordinator, editor, and other relevant titles and state whether the category includes, 1 FTE, 2 FTE, etc.

Factor 3

Corporate Experience (25 percent)

Offerors will demonstrate their corporate qualifications for operating the NIA Clearinghouses by completing the corporate experience grid (spreadsheet file attached). Please provide information about no more than **five** highly relevant examples of recent corporate experience for each of the specified areas in the corporate experience grid. This grid is designed to identify the tasks you have successfully accomplished and the relevant dates. This grid should reflect your true corporate experience. If you don't have highly relevant experience that cell should be left blank. If you have corporate experience with the particular task, please identify each relevant project; identify the client or clients for this service, and the name, telephone number and email address so that we may verify that your company has successfully performed this task. Please estimate what percent of the total effort each task represents—this number can range from 0-100 percent. You can use the **other** task category to present any non-covered tasks. The total for each project should equal 100 percent. Please do not include projects started before 1999 unless they are still active. A sample grid (spreadsheet) is attached, please do not alter or add categories to the grid. Narrative in this section is not needed. Canned corporate capability statements are not germane to this procurement and are especially unwelcome in this section.

Factor 4

Cost (25 percent)

Cost is important, but is not the sole factor in determining the winning bid. The contract will be priced as a time and materials contract. We will consider the hourly cost for different labor categories and the handling cost for acquired goods/services in addition to the total estimated cost for each year. The price of the contract should be a realistic assessment based on required tasks and quality of the staff members needed to accomplish the tasks. Along with other evaluation factors, realistic pricing costs will be used to determine which bid represents the best value to the government.

Task Order # NICS-156

TITLE: NIA/ADEAR CLEARINGHOUSE

PART II - CONTRACTOR'S REPLY: CONTRACT #263-01-D-0 _____

Contractor:

Points of Contact:

Phone-

Fax-

Address:

TOTAL ESTIMATED COST:

Pricing Method: T&M

TOTAL ESTIMATED NUMBER OF HOURS:

PROPOSED COMPLETION DATE:

FOR THE

CONTRACTOR: _____

Signature

Date

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: _____

RECOMMENDED:

FAX # Signature - Project Officer Date

APPROVED: _____

FAX # Signature - Contracting Officer Date

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: _____

Fax 301-435-6101 Signature -Anthony M. Revenis, J.D., NIH-PICS Coordinator Date