

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

RFTOP# 163 TITLE: NHLBI Health Information Center

PART I – REQUEST FOR TASK ORDER PROPOSALS

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B. PROPOSED PERIOD OF PERFORMANCE: March 1, 2004 - February 28, 2007

C. TASK DESCRIPTION: See Attachment.

D. TECHNICAL EVALUATION FACTORS: See Attachment.

E. PROPOSAL INTENT DUE DATE: All contractors intending to submit proposals must indicate their intent via e-mail to bindseil@nhlbi.nih.gov no later than November 18, 2003.

F. RESPONSE DUE DATE: December 10, 2003, by 4:00 p.m. local time. One original technical proposal and 10 copies. One original business proposal and 6 copies.

G. PRICING METHOD: CPAF

H. PROPOSAL INSTRUCTIONS: See attachment.

I. QUESTIONS CONCERNING RFTOP:
Due by 4:00 p.m. local time November 12, 2003

J. STATEMENT OF WORK

NOTE TO OFFERORS: This RFTOP procurement will result in the award of a performance-based task order. As such, offerors shall propose measurable performance standards to enable assessment of contractor work performance. A Quality Assurance Surveillance Plan (QASP) will be negotiated in which specific key performance requirements and incentives will be identified.

A. Background Information

The National Heart, Lung, and Blood Institute (NHLBI) of the National Institutes of Health (NIH) provides leadership for a national program in diseases of the heart, blood vessels, lung, and blood; blood resources; and sleep disorders. It also has administrative responsibility for the NIH Woman's Health Initiative. A critical adjunct to NHLBI's core program of clinical and basic research is its educational mandate—the translation and dissemination of science-based information based upon the research—that has a programmatic emphasis on early identification, treatment, and prevention. The essential role of both the research and educational tasks is the same: the reduction in the mortality and morbidity resulting from heart, lung, and blood diseases and the concomitant increase in quality and years of healthy life for all Americans.

The NHLBI Health Information Center (NHLBI HIC) is a primary information interface between the NHLBI and the American people as well as the citizens of foreign countries. As such, the critical nature of its mission cannot be overestimated. To the extent that the mission is fulfilled with excellence, people's health and well-being are enhanced.

Excellence in this context connotes a “world-class operation,” one that rests upon six pillars or principles:

Employment of Performance Measures. As part of the requirements of the Government Performance and Results Act (GPRA) and the Information Technology Management and Reform Act (ITMRA), performance measurement is an essential part of effective management. By using clear, measurable, and end-result performance measures, the NHLBI HIC can determine the extent to which it has achieved its objectives, whether they be in relation to saved dollars, improved customer satisfaction, expanded usage, or more rapid turn-around time in the translation and dissemination of information.

The use of performance measures throughout the tasks contained or implied in this RFTOP is fundamental to all aspects of its operation. The principles that follow would be mere platitudes without the systematic measurement of results from baselines relevant to the various task objectives.

Quality and Currency of Information. It is critical that the information emanating from the Nation's leading research institution on heart, lung, and blood diseases be of the highest quality, accurate, current, and reflecting the latest science. Anything less would be a disservice to the public trust placed in the NHLBI .

Accessibility of Information. All the best information in the world does little good if the public and health professionals cannot access it easily, in formats they can use, and in easy-to-read language that they can understand. Non-English speaking populations in the United States also must be served. In addition all the requirements of Section 508 of the Rehabilitation Act must be met; the law mandates that Federal agencies must ensure that electronic and information technology is accessible to members of the public with disabilities. For all people, the wealth of information available from NHLBI must be easily retrievable via various modes of communication through seamless and integrated technologies that facilitate access.

Use of Advanced Technologies. A 2001 report from Rand entitled *The Global Technology Revolution: Bio/Nano/Materials Trends and Their Synergies with Information Technology by 2015* asserts that “life in 2015 will be revolutionized by the growing effect of multidisciplinary technology across all dimensions of life: social, economic, political, and personal.” It will be incumbent upon the NHLBI HIC to anticipate and apply—within the scope of this RFTOP—relevant trends in all these dimensions. One aspect of this global revolution is the continuing growth of the Internet and its impact upon information formats, linkages, dissemination, and retrieval in all walks of life. The estimated number of Internet users in the United States has grown from approximately 40 million in 1997 to over 165 million in 2002 (Nielsen)—a four-fold increase in only 5 years.

Recognition by the Public and Health Professionals. There must be an increased awareness of the NHLBI as a trusted source of health and disease information. The educational mandate of the NHLBI is furthered to the extent that the public, health professionals, and health-related organizations seek or are exposed to this information. Only through expansive, bold, and imaginative marketing efforts can this be accomplished.

Creativity and Innovation. None of the other five pillars can reach their potential for excellence without dedicated and motivated staff who constantly strive for continual improvement. Project management must provide incentives and a conducive atmosphere for individual initiative to thrive. There also must be ongoing environmental scans that look 5-10 years to the future in order to identify trends and new technologies that can improve information translation and dissemination effectiveness.

These six pillars of excellence are the basic principles that are intended to guide the management and operation of the NHLBI HIC. They also represent day-to-day challenges that are meant to prevent the apathy and lethargy that all too often afflict ongoing enterprises.

These principles and the statement of work that follows identify some of the challenges and opportunities regarding the work to be performed. It has been designed to give offerors the freedom to propose how to best meet the government’s requirements in fulfilling the purpose of the work as opposed to emphasizing the specifics of how the work is to be performed.

Integrated Business Model

The above principles do not exist in isolation. They influence one another, and their infusion into each task and the effective integration and flow of these tasks are the primary determinants of success. For example:

- The availability of accurate and current information products increases customer satisfaction and awareness of the NHLBI HIC as a source of trusted information which in turn can increase the number of users and thus also increase cost-recovery monies that can be invested in new high-quality products
- The production of product quantities based on firm long-term marketing plans and the projected life of specific publications can result in less warehousing costs and allow more resources for printing and expansion of the Diseases and Conditions Index (DCI)
- Having the DCI on the Web site and as a database will allow information specialists to instantaneously respond to inquiries that formerly were labor-intensive; this in turn would allow the information specialists to spend more time on other tasks such as marketing or response development
- The use of just-in-time printing quickly meets the need of large institutional buyers, avoids back orders, reduces warehouse costs, and improves customer service

B. Objectives

The purpose of this procurement is to transition the existing NHLBI HIC into a performance-driven enterprise that incorporates a comprehensive business model plan. Elements of the business model should reflect a strong perspective of the importance of customer satisfaction in service delivery; reflect customer preferences in the planning, development, marketing of new health information products; present an integrative approach to operationalizing all tasks of the task order; utilize appropriate performance measures for each year of the task order that will result in maximized efficiencies of available resources; capitalize on the evolution of technology in maximizing efficiencies; employ a cost recovery program that can evolve into a self-sustaining materials production operation; operationalize “just-in-time” printing, including the use of digital printing, and other approaches to systematically reduce the amount of warehouse space and costs over the life of the task order; incorporate organizational and managerial approaches that reflect a results-oriented corporate ethic.

II. Services to be Performed

TASK 1: PROJECT MANAGEMENT AND ADMINISTRATION

The contractor shall develop, implement with the approval of the Project Officer, and maintain a project management and administration process that includes a work plan to carry out the task order. The work plan may include the following:

- # Tasks to be accomplished
- # Methods and time lines for achieving the task
- # Allocation of resources, costs, hours, and personnel
- # Transition planning, execution, and task order closeout that assures an orderly and timely transition at the time of task order expiration. This plan will address all stored publications and materials including paper and electronic copies, Government-furnished property and contractor-acquired property obtained through expenditure of funds from this task order, correspondence and official files, and shelf supplies of publications and materials used to respond to inquiries; project files; software programs developed or altered in the performance of this task order and for which task order funds were expended.

1.1 Project Director

The contractor shall provide a full-time project director for the period of performance of the task order who shall serve as the principal point of contact with the Government and who shall be responsible for the overall management of the task order including preparation of reports and plans, supervision of project staff, monitoring task order progress, and maintaining budget control.

1.2 Performance-Oriented Staffing

The contractor shall provide a highly qualified staff with appropriate job knowledge and skills to perform the technical requirements of a performance-based task order. The project staff of the contractor (and subcontractors, if any) shall be available to meet with program staff at the NIH in Bethesda with as little as 3 hours advance notice. Whenever possible, meetings will be scheduled in advance. The contractor shall meet this requirement within 30 days of task order award.

1.3 Results Reporting

The contractor shall ensure that all performance information collected in the operation of the task order, and recommendations to improve or simplify work practices, be formally submitted to the NHLBI for resource allocation decisions. Such information shall be summarized in electronically-submitted monthly reports to the NHLBI Contracting Officer and Project Officer. The contractor shall also electronically submit an annual electronic performance results report that will be used to identify gaps between goals and actual achievement, and analyses of the causes for the gaps. This report shall also include any proposed countermeasures or reengineering measures that will be taken during the next task order year in response to the identified gaps. Additionally, the contractor is encouraged to use a variety of different means including computer-driven, Web-enabled products to communicate with the NHLBI for the purpose of using performance information for prompt decision making to assure continuous improvement.

The contractor shall maintain and refine a digital communications network and infrastructure that will, over the life of this task order:

- # Enable OPEC and contractor staff members, vendors, subcontractors, and consultants located in different locations to work together effectively;
- # Allow OPEC to quickly and cost-effectively reach its target audiences with accurate and timely health information.

1.4 Strategic Performance Partnerships

The contractor shall identify and form strategic performance partnerships to collaborate in achieving performance goals and objectives of the contract. The potential to improve the quality and reduce the cost of government products and services should be paramount in these collaborations. Access to high-quality, “world class” skills, work processes, and technologies can be both time and cost saving through proper identification, facilitation, and coordination of such resources. Subcontractors, and consultants shall be viewed as performance partners as well and shall be held accountable for achieving performance results in accordance with the QASP.

1.5 Management and Administration of Cost Recovery

The contractor shall provide the necessary performance management and administrative functions to maintain and refine a comprehensive cost recovery program for NHLBI educational products and services in response to the requirements defined in Task 2.1 of the Statement of Work. The contractor shall provide proactive marketing resources to achieve maximum awareness/utilization of NHLBI products and services (Task 4.1).

1.6 Fiscal Reporting Requirements

The contractor shall develop, implement, and maintain a forecasting and reporting system detailing staff time and resources allocated and used both by task and by project. Associated costs, both direct and indirect, and funds remaining in the task order shall be reported to the Project Officer on a routine monthly basis. This information shall be made readily available at other times as well when requested by the Project Officer.

1.7 Security Procedures and Safeguards

Recent directives from the Office of Management and Budget (OMB) and the Department of Health and Human Services (DHHS) have emphasized the importance of appropriate security planning,

maintenance, and implementation for all contracts supported by DHHS. Contractors are required to have in place the necessary safeguards to ensure that the personal data collected and stored as a result of contract activities are in compliance with OMB Circular A-130 <http://www.whitehouse.gov/omb/circulars/a130/a130trans4.html>, Appendix III, Security of Federal Automated Information Systems and the DHHS AISSP Handbook <http://irm.cit.nih.gov/policy/aissp.html#OverviewXIV>.

The NHLBI HIC collects personal information about those who contact the Center by telephone, in writing, or by e-mail. This information usually includes, but is not limited to: name; address; telephone number; and e-mail address. In addition, the contract maintains mailing lists for publications and listservs for a number purposes such as e-mail notifications for press releases, new publications, etc. The contractor shall adhere to all laws, regulations, and requirements that apply to the data being collected for the purposes of this task order. The sensitivity of the data collected is designated Level 2, and the operational criticality of the data is also designated Level 2. Therefore, the overall Security Level designation for this requirement is Level 2. Everyone employed by the task order when it is awarded and all subsequent employees are required to sign a nondisclosure of personal information agreement to ensure the security of any data collected. In addition, contractor staff will be required to undergo background checks, conducted by the Office of Personnel Management (OPM) Investigative Service, based on their access to sensitive and confidential information or their ability to compromise the information system. The Government may require on-site inspection and/or testing of the safeguards that the contractor has implemented to ensure the security and integrity of the data being collected and stored.

1.8 Security Requirements

Persons without required background investigations cannot perform any critical/sensitive contract work until their investigations are completed or initiated by NHLBI's submitting the required forms and paperwork to OPM. Violation of this condition may lead to termination of the task order.

1.9 Security Certifications

The contractor shall certify in writing that:

- # It understands and will abide by the security requirements detailed in the statement of work and any new requirements when they are issued.
- # Prior approval by the Project Officer is required before any subcontractors, vendors, or suppliers are used.

1.10 Transition Plan–Task Order Month 1

During the first month of the task order, operational responsibilities shall be assumed from the incumbent contractor providing services to the NHLBI HIC. The awardee of this task order shall be required to develop and implement a specific plan and associated procedures for transition of operations from the incumbent contractor.

The contractor staff shall be required to meet with the Project Officer within 2 days after task order award to discuss critical activities requiring immediate attention. A series of meetings with incumbent contractor staff and NHLBI staff shall commence within 1 week after task order award.

1.11 Transition Plan–Task Order Month 36

At the end of month 35 of the task order, a 1-month transition plan shall be implemented based on the following possibilities:

- # The incumbent contractor is unsuccessful in a subsequent recompetition requiring similar contractor services, necessitating a transition of services to a new contractor.
- # A subsequent procurement requiring similar contractor services may not be issued, necessitating a transition plan for the Government to gradually assume certain contractor services (e.g., Information Center functions, warehousing).

Upon award of the project to new contractors or transfer of responsibility directly to the Government, the project director shall request from the Project Officer a transition plan developed by the new contractor or Government official in charge of the transition. The project director shall review the plan with the Project Officer to ensure a clear understanding of the tasks and responsibilities of all parties involved. The contractor's major responsibilities shall be to:

- # Participate in transition planning and schedule walk-throughs of project-related facilities and space.
- # Ensure that ongoing project tasks continue until the new service provider (contractor or Government) assumes those responsibilities.
- # Brief the new contractor staff or Government staff on the status and plans for each task activity.
- # Prepare (including packing, labeling, and inventorying) all project materials and records for transfer to the new service provider (contractor or Government).
- # Transfer any materials located in office or warehouse storage to the new service provider (contractor or Government).

TASK 2: RESPONSE CENTER OPERATIONS

2.1 Cost Recovery

Cost recovery is intended to be a driving force within the HIC and is key to generating revenue to help in meeting the ever-increasing demand for science-based health information. NHLBI's public health mandate requires dissemination of research results to guide public health policy, improve medical practice, and enhance the health of the Nation. This mandate must be met in an era of shrinking resources. A framework of existing legislation and policy creates possibilities for NHLBI to extend its resources through cost recovery and serve an ever-growing demand for science-based health information. The challenge is to implement a cost recovery program that is consistent with NHLBI's broad public health mission to serve diverse audiences, yet provides an effective way to maintain our information dissemination capacity and respond to the demands of the future.

The contractor shall provide the services necessary to conduct cost recovery activities for NHLBI information products and services. This task includes maintaining a system for receiving and accounting for revenue collected from customers, as well as projecting cost recovery goals, recommending prices, and marketing cost recovery products and services.

Under this task, the contractor is authorized to collect funds on behalf of the NHLBI for products and services approved by the Project Officer. Cost recovery shall be applied to publications, videotapes, and other materials for patients/public and health professionals. All funds collected under cost recovery shall be returned to the task order to offset costs and expand the capacity to increase consumer access and utilization of OPEC's products and services.

[For solicitation purposes, offerors should specify systems and strategies to be employed in

conducting cost recovery activities. Offerors should assume average monthly cost recovery income of \$45,000 throughout the task order period of performance.]

Cost recovery requirements shall include the following:

2. Maintaining a reliable and accurate system for receiving, accounting for, and reporting on cost recovery funds. A separate accounting should be maintained for all cost recovery expenses and income on a product-by-product basis, or other basis approved by the Project Officer. The contractor shall prepare a monthly report on items sold and revenue expended and received under cost recovery. Appropriate security and protection of consumer credit card information shall be an essential part of the contractor's system. And, the contractor shall develop and implement a plan for collecting outstanding receivables and withhold credit to purchasers with outstanding accounts.
3. Making recommendations to the Project Officer for pricing all new products and revising prices for existing products as necessary, so that prices can be adjusted over time to improve cost recovery operations and consumer satisfaction. Pricing recommendations should take into consideration customer needs and perceptions, costs of printing, marketing, order processing and fulfillment, warehousing and distribution, and prices of similar and/or competing products and services. Final prices will be approved by NHLBI.
4. Developing recommendations regarding products/quantities to be printed under cost recovery. The recommendations should be based on an analysis of customer needs, as well as actual and projected sales. As part of this process, the contractor shall develop a yearly cost recovery budget which will specify products targeted for cost recovery and projected sales levels. The contractor's cost recovery strategies, cost recovery budget, and pricing structure shall support average monthly cost recovery receipts of at least \$45,000 throughout the life of the contract.

The contractor shall also work with the CST to identify products that are outdated and develop recommendations for updating or deleting those products.

5. Based on the recommendations in item 3 above, the contractor shall be required to procure printing for specified products approved by the Project Officer. This will include "just-in-time" printing to meet the needs of institutional buyers as well as to avoid back orders.

[For solicitation purposes, assume that printing valued at \$400,000 per year will be required under the task order.

2.2 Fulfillment of Orders for Publications and Other NHLBI Products

All orders for NHLBI education materials shall be logged into the HIC Inquiry and Inventory Management System and fulfilled (mailed) within 3 business days of receipt. Individual orders shall be fulfilled within 2 business days of receipt and bulk orders within 3 business days of receipt. The contractor shall pack a pick slip and an "NHLBI Catalog of Educational Material" with all orders.

Cost recovery items with shipping costs—whether by U.S. Postal Service, UPS, Federal Express, or other means—shall be fully paid by the customer. Shipping options with different costs shall be offered to customers and shall range from 4th class mail to 1-day air delivery.

The contractor shall be responsible for working with institutional buyers who purchase large quantities of materials. This shall include, but not be limited to, working with buyers and printers to

produce materials that include the buyer's logo, providing printer's disks, and quick turnaround on order fulfillment.

The contractor shall fulfill orders from NHLBI's toll-free information line within 2 business days of receipt. This includes downloading files received from the NIH Center for Information Technology (CIT) contractor (currently WorldCom) and printing them as mailing labels/pick slips, and fulfilling the orders.

[For solicitation purposes, assume an average of 300 per month. During periods of intense marketing of NHLBI public awareness campaigns, assume 700 per month.]

As requested by the Project Officer, the contractor shall be responsible for fulfilling and shipping or delivering locally materials to NHLBI and other NIH Institutes and DHHS agencies, NHLBI contractors, and grantees.

The contractor shall explore the feasibility of product dissemination direct from the printing source and state-of-the-art mailing services that are fully automated in order to speed delivery and reduce costs. For the initial marketing dissemination of new products and other mailings, the use of specialized services should be recommended if they can be shown to improve efficiency, achieve more rapid market penetration, improve customer service, and result in cost savings.

2.3 Information Acquisition

The contractor shall ensure that the NHLBI HIC maintains accurate, up-to-date information on a range of topics related to the mission and goals of NHLBI, research conducted by the Institute, and health information on diseases of the heart, lung, and blood diseases and sleep disorders. To this end, the contractor shall:

- # Maintain and regularly update electronic and/or paper reference systems to be used as a source of information for replying to inquiries.
- # Ensure that all HIC information specialists shall be trained and highly competent in accessing required information through electronic sources in responding to information requests. Information specialist staff shall also be knowledgeable about all NHLBI publications and their content. The contractor shall further provide ongoing, in-service training for information specialist to ensure they are kept up-to-date on reference sources, research news, and other issues.
- # Ensure that an adequate storage and retrieval system exists for maintaining and accessing information and reference materials that allows information specialists to handle telephone inquiries without making call backs.
- # Develop, maintain, and use standard responses for common inquiries.
- # Maintain an up-to-date referral database of contact information, including Web addresses of appropriate Government agencies, voluntary health and professional organizations, and advocacy groups that are related to NHLBI's mission as sources of additional information for inquirers.
- # Work with the Project Officer to establish procedures for determining whether other organizations are appropriate for inclusion in the referral database.

2.4 Managing Inquiries

Contractor personnel shall be available to respond to inquiries during the NHLBI HIC's operating hours: Monday-Friday, 8:30 a.m. to 5 p.m. For the remainder of the 24-hour period and on weekends and Federal holidays, a voice-messaging system shall take calls and record messages. The Center's telephones shall be equipped and staffed sufficiently so callers do not have to wait beyond four rings or wait on hold for more than 1 minute. The contractor shall provide TTY service for hearing-impaired callers. [Note to offerors: The NHLBI HIC telephone and TTY lines are not toll-free.]

The contractor shall use an automated telephone system that allows callers to: 1) listen to an automated menu 2) place orders for NHLBI publications and products, 3) speak with an information specialist (during Center operating hours), or 4) leave a message.

The contractor shall work with the Project Officer and members of the OPEC Press Team as requested to create standard responses to breaking news stories about NHLBI initiatives and research. The contractor shall be prepared to respond to such requests within 2 hours.

The contractor shall refer Congressional inquiries received by the NHLBI HIC to the Project Officer within 1 hour of receipt. Press inquiries shall be referred to the NHLBI Press Team within 1 hour of receipt.

The contractor shall refer inquiries on NHLBI expenditures and policies and any inquiry that appears to be sensitive to the Project Officer on the day of its receipt.

The contractor shall maintain the current telephone and fax numbers, postage mail address and e-mail of the NHLBI HIC and e-mail address.

All inquiries (telephone, fax, postal mail, and e-mail) shall be logged electronically into the HIC Inquiry and Inventory Management System. The date received, name, address, telephone or fax number, e-mail address (if applicable), nature/subject of inquiry, date of response, and brief synopsis of response shall be included. The contractor shall provide the Project Officer with an inquiry log, as requested.

The contractor shall provide health information specialist staff with expertise and experience in answering health inquiries from patients, health professionals, and the public. Health information specialist staff shall possess, at a minimum, a bachelor's degree, and have an educational background that is appropriately related to health and health communications and be knowledgeable in the diseases and conditions under NHLBI's purview. Health information specialist staff shall also have experience in customer service, including handling difficult inquiries; responding to foreign language inquiries, especially Spanish-language inquiries; experience and skill in preparing responses to written inquiries; skill in database searches, including MEDLINE and Internet search engines; and be familiar with NHLBI resources and publications. In addition, health information specialists shall be required to read and become familiar with all NHLBI education and other materials distributed by the Center and become thoroughly familiar with NHLBI's Web site.

As part of the transition plan for the start up of the task order, the contractor shall submit a Staff Training and Development Plan to the Project Officer. This plan shall describe procedures for orientation and training of all staff assigned to the NHLBI HIC task order. This plan shall also apply to any new staff who join the project team during the task order period.

Within 3 months of the task order start up, the contractor shall submit to the Project Officer a Staff Continuing Education and Development Plan, which will describe proposed, regularly scheduled activities for the NHLBI HIC task order staff, particularly the health information specialists, that

will enhance their knowledge about NHLBI programs and research initiatives, update staff on new research findings and NHLBI initiatives, and increase their knowledge on heart, lung, and blood diseases and sleep disorders.

Within 4 months of task order start up, the contractor shall submit to the Project Officer a manual of NHLBI HIC operational policies and procedures. The current written policies and procedures for the of NHLBI HIC shall be used as a guide. This manual shall be kept updated on a regular basis throughout the task order period.

2.4.1 Telephone Inquiries

The contractor shall establish and maintain a resource file (electronic preferred, paper when necessary) that is immediately accessible to information specialists answering telephone inquiries, so that most inquiries are answered at the time of the initial call. If additional information is needed but not a customized letter, the contractor shall return the call as soon as the information is obtained, within 2 business days.

The contractor shall send out printed materials requested by telephone within 2 working days of their request. Telephone inquiries that require a customized letter shall be handled as described under “Written Inquiries” below.

The contractor shall respond to telephone voice mail messages left during nonoperational hours requesting an information specialists to return the call on the next business day. The contractor will process publication orders left by voice mail within 2 business days or receipt.

2.4.2 Written Inquiries (Includes E-mail, Fax, Web-based, and Mail)

The contractor shall develop and maintain an electronic file of standard responses to common inquiries, that can be used for all forms of written inquiries. The responses shall be reviewed and approved by the Project Officer.

The contractor shall send out standard replies to written inquires within 2 working days of receipt.

The contractor shall be responsible for producing custom letters in draft and final form, assembling relevant materials, obtaining Project Officer review and approval, and mailing replies along with any relevant publications. Draft response for custom letters shall be submitted to the Project Officer within 2 business days of receipt of the inquiry. Revisions to any drafts and mailing of the reply shall be completed within 1 day of return receipt of the final draft.

The contractor shall maintain a log and file of all custom letters, including the incoming letter or e-mail and the response. The Project Officer shall be provided with electronic access to custom letters. The electronic filing system is to be agreed upon by the Project Officer and contractor, and the system shall be established within 30 days of task order award.

Inquiries received by fax shall be acknowledged by return fax within 1 business day. Routine inquiries should be responded to in the return fax. If the fax a publication order, it will be filled within 2 business days. If the fax requires a custom response, the contractor shall follow the procedure above for custom letters.

E-mail inquiries shall be acknowledged within 1 business day of receipt (an automatic reply approved by the Project Officer may be used). Routine inquiries received by e-mail shall be answered within 2 business days and publication orders received by e-mail filled within 2 business days. The contractor

shall follow the procedure above for e-mails requiring a custom response.

If required by the Project Officer, the contractor shall be responsible for responding to inquiries received from users seeking help while navigating the NHLBI Online Catalog via Live Help. This will require live interaction with catalog visitors using multimedia text chat and monitoring Web site activity in real time.

[Note to Offerors: In 2002, the NHLBI HIC received 57,534 inquiries, averaging 4,795 per month. Of these, 10,626 required a custom response. The monthly range for inquiries was 2,587 to 7,704. Twenty-two percent of these inquiries were received by telephone, 17 percent by postal mail, 57 percent by e-mail/Web, and 4 percent by fax. The remainder were received through NHLBI program partnership leaders.]

2.5 Servicing NHLBI's 800 Number Information Line

NHLBI maintains a toll-free number (1-800-575-WELL) that currently gives callers a choice of hearing recorded information on either The Heart Truth Campaign or high blood cholesterol and high blood pressure. After the recorded message, callers have the option of speaking with a live operator to order a free brochure on The Heart Truth Campaign or several free fact sheets on high blood pressure and high blood cholesterol. This number is used as a tag on NHLBI public service announcements and other products and often appears in print with articles related to NHLBI.

The contractor shall work with the Project Officer and the NIH CIT representative to maintain the toll-free telephone line and resolve problems when they occur. Currently, the service is provided by WorldCom via NIH contract.

The contractor shall be responsible for receiving computerized data files on use of the number and mailing labels from the NIH CIT contractor on a daily basis, fulfilling publication orders, analyzing the data, and providing the Project Officer with monthly reports that track usage.

If requested by the Project Officer, the contractor shall prepare new scripts for the information line and record them by remote access.

2.6 Courier Services

The contractor shall make use of the NHLBI HIC post office box at Bethesda, Maryland Post Office-20814. The contractor shall provide courier service as follows:

- # At least once per day (at a regular time approved by the Project Officer) between all of the contractor's facilities used for this task order and NHLBI's Office of Prevention, Education, and Control at NIH, Building 31, Room 4A10.
- # At least once per day pick up letters and packages from the Bethesda, Maryland Post Office and deliver to the NHLBI HIC staff.
- # Be available, as requested by the Project Officer, for occasional special runs to pick up or deliver at other NIH offices and other locations in the Washington, DC metropolitan areas.
- # Be able to pick up or deliver exhibits or boxes of publications, when needed.
- # Make arrangements for the delivery or pick up of loads requiring a larger truck, when requested by the Project Officer.

In an emergency situation, be able to pick up or deliver materials within 2 hours.

2.7 Monthly HIC Report

The contractor shall prepare a monthly electronic report that will provide all inquiry, 800 number, and product ordering totals. The report may be combined with a similar report on cost recovery revenue.

TASK 3: INFORMATION DEVELOPMENT OPERATIONS

3.1 Identification of Customer and Information Development Needs and Priorities

An important objective for NHLBI is to make the product planning and development process more market driven. NHLBI seeks to implement best-practice approaches to understanding audiences and their information needs, designing products that respond to those needs, making them affordable to customers, and delivering them in ways that are effective and affordable to NHLBI.

The contractor shall implement customer analysis through various methods to gain an understanding of customers' needs and perceptions of information products and services. Methods may include mail and telephone surveys, in-depth interviews, focus groups, analysis of existing data, and other means as appropriate.

Requirements shall include:

- # Analyzing the HIC customer base, including profession, practice setting, location, type and extent of contact with the HIC, materials ordered and other pertinent information.
- # Determining customer needs for services and products; conceptualizing new practices, services, and products; gauging customer perception of products and services; and evaluating and refining existing services and products.
- # Analyzing cost recovery activities to determine appropriate products and pricing and cost recovery policies, and to recommend new products and services under cost recovery.

3.2 Development, Writing, and Preparation of Information

Based upon the above assessments, the contractor shall develop new (or adapt existing) information in a variety of formats including consumer brochures, pamphlets, fact sheets, etc., that can be disseminated through various channels.

The contractor shall provide writers who, working closely with NHLBI staff, will translate complex scientific information into useful formats for diverse audiences.

The contractor shall analyze user inquiries based on data compiled in the HIC Inquiry and Inventory Management System. The analysis shall report trends in user needs, examine volume, and make recommendations for creating new materials or information packages to standardize more responses.

For all information developed, the contractor shall provide both substantive and copy editing services to ensure that the final product is clear and readable and meets required specifications.

The contractor shall provide NHLBI with complete graphics services, ranging from concept

development, clearances, and design to final preparation and production, including digital delivery. The contractor shall also procure the services of outside vendors who can provide graphic design services uniquely suited for a specific product.

The contractor shall review all graphics for visual effectiveness, quality of design, and consistent theme, and quality control. The project director shall oversee all processes involved in quick-turnaround projects to ensure accuracy and adherence to the production schedule.

The contractor shall provide a monthly status report of all products in development.

3.3 “NHLBI Educational Materials Catalog”

A key tool in NHLBI’s marketing, cost recovery, and information dissemination activities is the “NHLBI Educational Materials Catalog” in print and online.

The contractor shall service the both the print and online versions of NHLBI’s catalog of products and information services. (See Task 5.3 for the online catalog requirements.) The print catalog will be updated annually, incorporating information on new products and services and maintaining/updating information on existing products selected for continued inclusion in the catalog.

All product content contained in the catalog shall continue to be made available on the NHLBI Web site. Ordering of publications through NHLBI’s Web site shall be facilitated and the contractor shall use a secure encryption system to safeguard customers’ credit information.

The contractor shall maintain a database-driven information system using open standards for the catalog. This content application system that is installed should allow for truly dynamic Web page delivery, with content that can be automatically adjusted based on user preferences, hyperlinks that never need adjusting, and navigation panels that will always be reflective of current information and categories.

The contractor shall produce, print, and disseminate one version of the catalog annually, approximately 40-pages in length, for health professionals and patients/public. The catalog is intended to serve as an important means of marketing NHLBI publications and should be promotional in tone and design.

TASK 4: MARKETING AND PROMOTION OPERATIONS

The purpose of this task is to provide for the strategic marketing of a wide range of NHLBI education materials and information services using state-of-the-art tactics and vehicles, including Internet marketing. Under this task the contractor shall seek to achieve a marketing operation that is proactive, data-driven, cost-efficient, and results-oriented.

4.1 Assessment of Customer Needs and Product Performance

The contractor shall work with the Project Officer to develop customer satisfaction surveys, obtain OMB clearance, administer surveys, analyze data, and implement solutions to identified customer service problems. Customer satisfaction surveys may be Web-based, telephone, or written.

The contractor shall identify and assess information, and prepare reports on the needs of defined categories of customers and their perceptions of NHLBI materials and services, as well as revenue

from cost recovery, “top sellers,” frequently-requested items, Web usage, and similar measures. The information will be used to plan marketing strategies and tactics, refine existing NHLBI products and services, and stimulate new products.

4.2 Marketing Plan Development

For products, services, or programs designated by NHLBI, the contractor shall prepare individual marketing plans, specifying marketing objectives; target markets and relevant intermediary organizations; amount of product required to fulfill demand; marketing tactics, materials, and estimated costs; and evaluation measures.

4.3 Marketing Plan Implementation

The contractor shall maintain the capacity and provide the services to fully implement the plans developed in Subtask 4.2. This includes purchase of mailing labels as required for direct mail tactics, creation of promotional flyers and other marketing materials, oversight and coordination of direct mail operations and order fulfillment, and relationship-building with customers and intermediary organizations on an ongoing basis. In carrying out this activity, the contractor also shall provide the knowledge base and services required to carry out marketing through state-of-the-art electronic means. This includes use of Internet marketing techniques and services and marketing through NHLBI’s Health Information Network (HIN) (see Subtask 4.4).

4.4 NHLBI Health Information Network and Web Site Update Service

The NHLBI HIN is an electronic update service for health professionals providing information about NHLBI research and program news, products, and services. It currently has about 58,000 subscribers. Upon registering, subscribers can create an information profile of topics/audiences of interest to them and receive only the relevant update notices. Update notices are issued approximately twice per month.

The contractor shall provide the necessary services to maintain and enhance the HIN, including: maintaining the HIN membership database (see Task 5.6); providing marketing and promotion activities to increase the HIN membership by at least 30 percent annually; planning and disseminating the HIN electronic update notices; disseminating NHLBI press releases, sometimes on short notice of just a few hours; and analyzing and reporting on feedback from subscribers.

In addition, the contractor shall maintain and operate the “InfoNet,” NHLBI’s update service for major health-related Web sites. The service provides the content editors of health Web sites with electronic updates on NHLBI news, products, services, and programs. The task includes maintaining and enhancing the InfoNet database; planning and developing electronic update notices, usually based on the HIN update notices; disseminating the update notices and NHLBI press releases, sometimes on short notice; and analyzing feedback from recipients.

4.5 Analysis and Reporting of Marketing Results

The contractor shall develop and implement systems for collecting customer and product sales information for specific marketing efforts. The information will be used to produce reports on marketing results for products and services specified by the Project Officer. The reports will include an analysis of the impact of marketing activities on product distribution and cost recovery and use of such NHLBI services as the HIN. The contractor shall produce a year-end report on marketing efforts and overall results.

4.6 Management of NHLBI Exhibits

The contractor shall be responsible for all phases of exhibit management including scheduling and arranging for exhibit space, paying exhibit fees, procurement of exhibit services, exhibit and materials shipping, setting up and taking down the exhibit display and materials (or arranging and paying for this service if necessary), and exhibit storage. As directed by the Project Officer, the contractor shall assist NHLBI's Office of Minority Health Activities in developing plans for yearly exhibit schedules, shipping NHLBI materials to events, and staffing exhibits.

The contractor shall be responsible for providing staffing for NHLBI exhibits. As representatives of NHLBI, staff shall be knowledgeable about the Institute (mission, research areas, national education programs and initiatives, education materials) and be prepared to answer basic inquiries and make referrals to other NHLBI resources, as needed.

The contractor shall be responsible for inspecting all exhibits and displays upon return to the warehouse after each exhibit and report any damage to the Project Officer. The contractor shall arrange for exhibit repairs, as directed by the Project Officer and shall be responsible for storing NHLBI exhibits.

The contractor shall include a exhibit summary report, as part of each monthly progress report, that provides information on each exhibit, including the number and types of materials sent and distributed, the number and type of participants attending the event, comments and problems, and suggestions for future exhibits at the event.

The contractor shall develop an annual, calendar year NHLBI Exhibit Plan. This plan shall be based on NHLBI National Education Program priorities, strategic marketing of education products, and need for the dissemination of specific research findings and clinical guidelines. The plan shall include a listing of proposed conferences/events, dates, location, estimated costs (booth space, onsite costs, shipping, etc.), proposed staffing, and labor hours. Each year's plan shall reflect ways to control exhibit costs while increasing the scope of exhibits outreach through use of technology, including computer-generated displays, onsite transmission of product to home or worksite computers, opportunities to explore new NHLBI Web site features and content at the booth, the capability of joining the NHLBI HIN at the exhibit, and Internet-based "virtual exhibits." The plan for each upcoming year shall be due on November 1.

As requested by the Project Officer, the contractor shall be responsible for arranging delivery of NHLBI displays and materials to local events in the greater Baltimore-Washington area, setting up and breaking down the exhibit, and picking up leftover materials. The contractor may or may not be asked to staff these local exhibits.

The contractor shall work with the Project Officer in selecting and shipping NHLBI education materials to events and outreach programs that are conducted by other NIH Institutes or DHHS and supported by the NHLBI. (Examples: NIH ICs Information Officers/Participation Hispanic Heritage Month Celebration; National Institute for Nursing Research Events; ORWH events; NIH sponsorship of Hispanic Health Fairs in 10 U.S. cities)

As directed by the Project Officer, the contractor shall design up to three new exhibits during the period of performance of this task order.

TASK 5: INTERNET AND WORLDWIDE WEB SUPPORT OPERATIONS

5.1 Web Development and Internet Support

The contractor shall set up and host servers and special applications to support the NHLBI Web site. This includes a Web development, multimedia, and forms database servers. The hosting and maintenance of these servers shall comply with the AISSP security requirements, the Computer Security Act of 1987; office of Management and Budget (OMB) Circular A-130, Appendix III, "Security of Federal Automated Information Systems;" and the DHHS AISSP Handbook. The contractor shall:

- # Set up and maintain a "development server" that "mirrors" or replicates the NHLBI Web site. The development server shall duplicate the configuration of the NHLBI Web Site in every respect including the Apache Web Server software running on a UNIX-based computer or the current configuration at the time. The purpose of the development server is for the review, testing, and approval of Web pages, applications, and sites developed for the NHLBI. Tested items approved by the NHLBI shall be transferred to the NHLBI for placement on the NHLBI Web site.
- # Set up and maintain a multimedia Web server to host streaming video, audio, and other multimedia files in support of the NHLBI Web site.
 - Create digital files from a variety of sources and convert them to appropriate formats for use on the Web.
 - Create or arrange for the captioning and video descriptions of all video files in compliance with Section 508, the Federal government's Electronic and Information Technology Accessibility Standards.
 - Keep the server updated and configured to support the standard multimedia formats used on the Web.
- # Develop, host, and maintain Web forms to collect and display information from users in support of NHLBI programs. For an example, see the Web form for World Asthma Day at <http://www.nhlbi.nih.gov/health/prof/lung/asthma/wad/activity.htm>. These forms generally collect personal information that users may select an option that the personal information not be displayed on the public Web site. The contractor shall:
 - Collaborate with other NHLBI contractors who may be responsible for developing a subsite for an NHLBI campaign or program that includes a Web form to collect information from users.
 - Develop a form based on field and layout specifications provided by the NHLBI and post on an Extranet or server visible to the NHLBI and another NHLBI contractor if appropriate.
 - Upon approval of the form by the NHLBI, connect the fields to a database and test the form's operability and compliance with Section 508 and other NHLBI Web requirements.
 - Develop a system—Extranet, e-mail, or other—for the review and approval of user input before posting to the Web. The system shall automate the review and approval process and be flexible enough to allow access by NHLBI staff and staff from another NHLBI contractor. The system shall also have the capability to send an email notification to the user indicating that the information is online.
 - Develop an administrative module that enables project/campaign managers to produce simple statistical reports based on predefined criteria. Reports may include simple counts and cross-tabulations of entries or activities by selected categories.
 - At the end of the campaign, deliver the following archive files to the NHLBI on a CD or other appropriate media:
 - < The final display page as a PDF file.
 - < A delimited text file of the content of the database.

- < The content of the database formatted in a FileMaker Pro file or other specified database supported by the NHLBI.
 - Limit access to the personal information collected in the forms to staff with appropriate security clearance.
- # Prepare publications, slides, and other documents in appropriate Web formats (HTML, PDF, XML, etc.) for placement on the NHLBI Web Site.
 - # Provide graphic support for original graphic development and the acquisition of stock photos.
 - # Provide security in compliance with the DHHS AISSP Handbook. To assure continuous compliance, the contractor shall also:
 - Provide NIH and NHLBI information technology staffs with continuous access to scan the hosted servers for vulnerabilities.
 - Make corrections based on NIH/NHLBI security recommendations.
 - Identify a contact person who is available 7 days a week and 24 hours a day that the NIH/NHLBI Incident Response Team can contact in the event a Web page hosted by the contractor is defaced or other security issue.
 - Immediately contact NHLBI should they discover a security breach (defacement, hacker, etc).

5.2 Publications Inventory Database-Web Site Integration

The contractor shall work with the OPEC and NHLBI Web staffs to fully integrate the publications inventory database with the entire NHLBI Web site. This includes Web page production, adding publications and items to the shopping basket, and completing an order. The contractor shall:

- # Assess the current operation and recommend an approach to use information “pushed” from the database in all related Web pages that should include the information. The recommended approach should not attempt to redesign the NHLBI Web site or establish a document management system, which is beyond the scope of this procurement.
- # Recommend an approach that enables users to select multiple items from any list and add them to their “shopping basket.” Lists include static HTML list of publications and dynamic lists produced from a search. The shopping basket feature should be omnipresent but seamless and unobtrusive to the user.
- # Recommend an approach to include a “Check Out” feature throughout the NHLBI Web site that visitors may use when they finish browsing and adding items to their shopping baskets.
- # Develop a plan to implement the recommendations approved by the NHLBI. The plan shall include a map of all pages that will receive “pushed” information, the type of programming technology required, type of personnel required, and a time line for completion.
- # Demonstrate the approach on the “mirror” or replica of the NHLBI Web site. The demonstration shall be of a scale necessary only to demonstrate the approach and identify potential problems.
- # Make adjustments based on the OPEC and NHLBI Web staffs’ assessment and review of the demonstration.

- # Apply the final approach approved by the OPEC and NHLBI Web staffs to the entire “mirrored” NHLBI Web site. Test the site thoroughly for accuracy and adherence to all NHLBI Web development policies including Section 508, the Federal government’s Electronic and Information Technology Accessibility Standards.
- # Work with the OPEC and NHLBI Web staffs to transfer the tested and approved mirror site to the main NHLBI Web site.

5.3 Online Catalog Maintenance

The contractor shall work with the OPEC Consumer Services Team and the OPEC and NHLBI Web staffs to update the Online Catalog with the features that users expect and substantially reduce or eliminate the problems associated with completing an order. The contractor shall also:

- # Analyze the comments from users related to problems ordering over the past 3 years and test the catalog to see if the problems still exist. Report the findings to the NHLBI.
- # Conduct an “environmental scan” of a sample of representative Web sites with online ordering to identify how it is integrated with the site, the features offered, and the layout of the user interface.
- # Develop and submit a plan to conduct a usability test of the Online Catalog with eight people. The test subjects shall come from the general public and represent diverse backgrounds and computer skills.
- # Conduct the usability test of the Online Catalog based on the plan approved by the NHLBI.
- # Analyze the findings from the usability study and make recommendations for improvement. Submit a report and present the findings and recommendations to the NHLBI.
- # Based on the environmental scan of Web sites with online ordering and the findings from the usability study of the Online Catalog, develop and submit a plan to update or redesign the Online Catalog. Implement the plan approved by the NHLBI to update or redesign the Online Catalog.
- # Develop and submit a plan to conduct a usability test of the updated or redesigned Online Catalog. The usability test shall include 8 participants if the Catalog was updated or 16 participants if the Catalog was redesigned. Conduct the usability test of the updated/redesigned Online Catalog based on the plan approved by the NHLBI.
- # Report the findings and recommendations to the NHLBI, and make revisions to the Online Catalog based on the recommendations approved by the NHLBI.

5.4 Web Comments and Inquiries

The contractor shall adapt the inquiry management system to immediately notify the OPEC and NHLBI Web staffs of technical problems, transfer copies of inquires and replies to an NHLBI Web inquiries database or mailbox, and produce monthly reports that describes the technical problems encountered, information and items not found, other types of questions asked, and preferences and wants expressed by users.

5.5 Search Engine Placement

The contractor shall acquire and implement software to track the placement of the NHLBI Web subsites on the major search engines (Google, Alta Vista, etc.). The contractor shall:

- # Make quarterly reports of the findings to OPEC, Information Center, and Web staffs.
- # Cumulative annual report to show longitudinal results and make recommendations for improvements.

5.6 Health Information Network Database and Web Interface Maintenance

The contractor shall work with the OPEC Consumer Services Team and the OPEC and NHLBI Web staffs to keep the HIN database up-to-date and secure. The database contains the name, mailing address, telephone number, profession, interest, and email address of subscribers. The security shall comply with the AISSP security requirements, the Computer Security Act of 1987; office of Management and Budget (OMB) Circular A-130, Appendix III, "Security of Federal Automated Information Systems;" and the DHHS AISSP Handbook. The contractor shall:

- # Change the status of subscribers with "returned e-mails" from "active" to "inactive" in a timely manner and before the next mailing.
- # Track the number of subscribers who are unable or refuse to use the Web interface to update their information or "unsubscribe."
- # Make monthly reports on subscriber difficulties/complaints with the Web interface.
- # If subscriber difficulties/complaints with the Web interface are high (more than four per month) or start to increase, study the interface and make recommendations for improvement.
- # Conduct subscriber surveys and usability tests to identify problems with the Web interface as needed.
- # Update the Web interface as needed.
- # Limit access to the content of the database to staff with appropriate security clearance.

5.7 Diseases and Conditions Index

During the final month of the DCI contracts (March 2005), the contractor shall work with the DCI contractors and the DCI Project Officer to assume full responsibility for the operation and maintenance of the DCI by April 1, 2005.

The contractor shall transfer and setup the infrastructure on servers hosted by the contractor. The infrastructure includes the Web interface, database and connectivity, search engine, Extranet, Web statistics. The setup shall maintain the level of functionality and security.

The DCI was built on the open source Web platform. The contractor shall demonstrate the capability and experience with the open source Web platform with comparable applications. In the absence of open source capability or experience, the contractor may propose an alternative platform, with no cost to the Government for conversion to the new platform. The contractor shall provide documented justification that the security and cost of setup and maintenance alternative platform is comparable to open source.

The contractor shall:

- # Format and enter new content as developed and edit existing content with corrections are submitted.
- # Track usage statistics and post and maintain monthly statistical reports on the Extranet.
- # FTP daily logs to the NHLBI Web Trends servers for analysis.
- # Acquire and maintain a team of writers to develop new content for the DCI as requested by the NHLBI. Writers shall have training and demonstrated skills in writing health content in plain language for patients and the public. For the purpose of this solicitation, assume the need to write new content for about 10 diseases or conditions each year.
- # The contractor shall arrange for digital or other professional printing of formatted content from the DCI on topics selected by the NHLBI. For the purpose of this solicitation, assume 25 topics per year and 1,000 copies for each topic.
- # Use the automated procedure that extracts the content from the DCI and imports it to a specially designed desktop publishing template.
- # Inspect the imported data for the proper pagination, inclusion of URL's for all links, and graphic placement. Make corrections as indicated.
- # Follow regular printing procedures.
- # Provide security in compliance with the DHHS AISSP Handbook. To assure continuous compliance, the contractor shall also:
 - Provide NIH and NHLBI information technology staffs with continuous access to scan the hosted servers for vulnerabilities.
 - Make corrections based on NIH/NHLBI security recommendations within the specified time frame.
 - Identify a contact person who is available 7 days a week and 24 hours a day that the NIH/NHLBI Incident Response Team can contact in the event a Web page hosted by the contractor is defaced or other security issue.
 - Immediately contact NHLBI should they discover a security breach (defacement, hacker, etc).

TASK 6: WAREHOUSE AND DISTRIBUTION OPERATIONS

6.1 Warehouse Services

The contractor shall provide safe, secure, and dry storage of NHLBI materials and products in a 5,000 square foot warehouse located within 45 minutes of the NIH campus. Such storage shall be sufficiently clean, accessible, and physically configured to allow for timely, accurate, and efficient receipt, storage, retrieval, and processing for distribution/delivery of all materials required under this contract. It shall also have sufficient workspace and the necessary supplies and equipment for order fulfillment staff.

The contractor shall provide climate-controlled storage for NHLBI's archival collection of audiovisual materials and film negatives as well as printing disks and negatives. The contractor shall

- # Maintain a storage system for printer's disks.
- # Maintain a library of electronic files, illustrations, logo, and signatures.
- # Organize the negatives in a manner that will facilitate quick access and retrieval.
- # Receive requests for negatives and ship to the NHLBI staff within 1 business working day.
- # Provide a semiannual report of all negatives, which includes titles and publication numbers.

Within 1 month of the task order award, the contractor shall make arrangements for picking up and transporting all NHLBI materials stored in the DC Arc warehouse to the contractor's warehouse. [For solicitation purposes, assume 100 skids to be moved from DC Arc.]

Within 3 months of task order award, the contractor shall have all NHLBI materials and products appropriately organized, racked, and stored.

The contractor shall:

- Receive, verify, and store NHLBI materials and other products
- Check the identity, quantity, and quality of each shipment upon receipt
- Notify the Project Officer and other members of the Consumer Services Team on the day or receipt or the morning of the next business day of the quantity, arrival date, problems, and any other pertinent information.
- Send the Project Officer copies of the new document (quantity TBD).
- Enter shipment information into the NHLBI Inventory Management System.

6.2 Archival System

NHLBI maintains a system to archive and store historical NHLBI publications and materials. This system includes an electronic inventory (Access database) and a boxed physical inventory (3 copies of each historical material.) The archives also contain copies of audiovisual products, which must be stored in a climate-controlled area.

The contractor shall archive NHLBI materials as needed and maintain both the electronic and physical inventories of the NHLBI Archival System. The contractor shall make the electronic database available to the Project Officer.

6.3 Inventory Management

[Note to offerors: The current NHLBI Inventory Management System is built on from the Microsoft Great Plains eEnterprise Distribution Series infrastructure integrated with a Verisign secure SSL Web site. (See Task 5 for additional information.)

The contractor shall track electronically and report the receipt, use, dissemination, and inventory levels of all NHLBI publications and other products. The contractor shall operationalize the current NHLBI Inventory Management System within 2 weeks of task order award.

The contractor shall be responsible for proposing and operationalizing updates and upgrades the NHLBI Inventory Management System throughout the task order period.

The contractor shall set re-order thresholds for all products and prepare a monthly Reprint Needs Report.

The contractor shall develop a plan within 2 months of task order award for reprinting NHLBI

publications using a “just-in-time” printing process that allows NHLBI to quickly fill large bulk publication orders and maintain the required inventory to minimize the number of skids in storage and the cost of warehousing NHLBI materials and products.

6.4 Mass Mailings

The contractor shall provide resources and staffing to coordinate and prepare small volume (1,000 pieces or fewer) mailings including letters, marketing brochures, and sample materials.

For large mass mailings (over 1,000 pieces), the contractor shall obtain three (3) bids from local sheltered workshops designated under the Javits-Wagner-O’Day Act. The contractor shall be responsible for assigning the job to the lowest bid sheltered workshop, arranging for materials to be shipped to the workshop’s facility, and overseeing the progress, completion, and quality monitoring of each job.

6.5 State-of-the-Art Mailing Services

The contractor shall explore the feasibility of product dissemination direct from the printing source and state-of-the-art mailing services that are fully automated in order to speed delivery and reduce costs. For the initial marketing dissemination of new products and other mailings, the use of specialized services should be recommended if they can be shown to improve efficiency, achieve more rapid market penetration, improve customer service, and result in cost savings.

REPORTING REQUIREMENTS

A. Technical Progress Reports

1. Monthly Reports: Two reproducible and electronic copies shall be due 10 calendar days after the end of each month. Reports shall be in narrative form, and include all activity conducted during the previous month. Monthly Reports shall include:

- A quantitative and qualitative description of overall progress including the hours and dollars expended by task as well by individual project work plan during that month, and funds remaining in the task order and in each project work plan;
- Labor hours shall be reported by task and categorized by: task; staff name; number of hours budgeted for task for contract year; current month–hours used; task order year cumulative–hours used; remaining hours for task order year; cumulative hours used for entire task order; and a summary page of all appropriate columns. Annual Report to include an additional column: variance between hours budgeted and hours used.
- Labor expenditures shall be reported by task and categorized by: task, staff name, hourly rate; current month–amount spent; contract year cumulative labor dollars budgeted; task order year cumulative labor dollars spent; remaining dollars for task order year; cumulative amount spent for entire task order period; and summary page that totals columns and adds all loading factors (fringe, fee, etc.). Annual Report to include an additional column: variance between amount budgeted and spent.
- An indication of any current problems that may impede performance, and proposed corrective action; and
- A discussion of the work to be performed during the next monthly reporting period.
- The Inventory, Reprint Needs, Cost Recovery, 800 Number, Products in Development, and DCI (after April 2005) Usage reports shall be attached to the narrative Monthly Report.

2. Annual Report. Two copies shall be due 30 days after the completion of each year of the period of performance.
3. Marketing Report: Two copies of the Marketing Report (as described under Subtask 4.5) shall be due in months 13 and 25. The report shall include an analysis of the impact of marketing activities on product distribution and cost recovery, and use of NHLBI services such as the HIN.
4. Annual Exhibit Plan: The contractor shall submit two copies of the Annual Exhibit Plan for NHLBI Project Officer approval.
5. Final Report or Evaluation Report: Two reproducible copies of a final report shall be submitted 30 days before the conclusion of the task order.
 - Data Files, Disks, and Media Master Copies: The contractor shall deliver to the NHLBI Project Officer, on or before the last day of the contract period of performance, all master copies of all materials produced during the task order period. This includes all originals (print materials and graphics), disks, videos, CD-ROMs, DVDs, negatives, photographs, slides, computer files and any other media or print master copies. The materials shall be clearly marked and an inventory of all materials shall be included.
6. Technical Reports as Directed by the NHLBI Project Officer: The contractor shall prepare additional technical reports based on the statement of work as specified by the NHLBI Project Officer.

DELIVERABLES

Satisfactory performance of the final contract shall be deemed to occur upon delivery and acceptance by the Contracting Officer, or the duly authorized representative, of the following items, or their equivalent, during each year of the contract, in accordance with the stated delivery schedule:

<u>Item</u>	<u>Description</u>	<u>Quantity</u>	<u>Delivery Schedule</u>
1			Staff Training and Development Plan 2
2	Staff Continuing Education and Development Plan	2	End of month 3
3	Manual of Operational Policies Procedures	2	End of month 4
4	Monthly Report, including Narrative, Budget, Inventory, Reprint Needs, Cost Recovery, 800 Number, Products in Development, and after April 2005, DCI Usage	2	10 days after end of each month
5	Annual Report	2	30 days after completion of each year
6	Stored Negatives Report	2	Every 6 months
7	Marketing Efforts Report	2	End of months 13 and 25
8	Online Catalog Comments Analysis and Usability Testing Materials	TBD	Per Task 5.3

9	Search Engine Placement Report	2	Per Task 5.5
10	Electronic Files of Web Pages	all	End of task order
11	Final Report or Evaluation Report	2	30 days before the conclusion of the task order

All the above items (1-11) shall be delivered to the NHLBI Project Officer. Copies of the monthly reports and annual operational plans only shall be delivered to the Contracting Officer. Addresses are as follows:

Project Officer
NHLBI/OPEC
31 Center Drive MSC 2480
Building 31, Room 4A10
Bethesda, MD 20892-2480

Contracting Officer
NHLBI/DEA/Contracts Operations Branch
BDR Contracts Section
6701 Rockledge Drive MSC 7902 (Room 6134)
Bethesda, MD 20892-7902

Reference Materials

The NHLBI strongly recommends that offerors become familiar with the following reference materials. They are intended to assist offerors in the preparation of their proposals. Failure of offerors to examine the reference materials prior to proposal preparation and submittal will be at the offeror's risk.

<http://hin.nhlbi.nih.gov>

www.nhlbi.nih.gov

NHLBI Worldwide Web and Internet Applications (Attachment 1)

K. TECHNICAL EVALUATION CRITERIA

Proposals submitted in response to this solicitation will be subjected to an in-house review by an ad hoc committee of the NHLBI and other NIH staff who are familiar with the requirements of the RFTOP.

Specific technical evaluation criteria to be considered in the review of proposals are shown below:

1. Understanding of the Requirements and Adequacy of the Proposed Approach 35 points

Evaluation will be based on the offeror's response to Task Areas 1-6. The evaluation will focus on the understanding of the kind and level of support required, the quality of the technical approach, and the quality, efficiency, and effectiveness of the work products described and demonstrated by the proposal.

The offeror must clearly describe the proposed processes for performing the work under each task (as opposed to repeating the requirements). The evaluation will focus on the offeror's demonstrated innovation and creativity and ability to achieve the six principles of excellence of a world-class operation as described in the Background Information section.

The offeror must provide a detailed plan for an effective system of quality control, citing examples of its experience with the types of errors that may be encountered in work of the kind to be performed under this contract and the mechanisms that it has in place to guard against future occurrence of such errors.

2. Qualifications of Personnel 30 points

The personnel to be used under this contract will be evaluated on the basis of experience, qualifications, and availability. The personnel shall be appropriate to the level and kind of work required. Qualifications and experience will be evaluated as follows:

The program manager shall be a senior staff member of the company. He/she shall be evaluated on prior performance and demonstrated ability in effective program management and cost and quality control. Supporting materials shall include a curriculum vitae and statements of reference concerning management activities similar to those solicited. If the proposal includes subcontracting relationships, evidence must be provided of the ability of the program manager to ensure timely completion of quality work from a subcontractor.

The qualifications, availability, and experience of proposed professional staff to work under this contract (including those committed to the contract in writing but not yet working with the company) will be evaluated on the basis of curricula vitae and samples of work. Work samples shall be similar to products described in Task Areas 2-6 of the RFTOP. Samples will be judged in terms of ability to develop materials that are appropriate, clear, and succinct. Correct use of grammar, quality of editing, and absence of jargon are imperative. The proposal itself will be considered a work sample, and contributors to the proposal shall be identified by name and corresponding section of the proposal.

3. Organization and Administration 20 points

Clarity and effectiveness of organizational relationships, including relationships with subcontractor(s), if any, expected ease and efficiency of management and control, and company commitment to this contract will be evaluated. Particular emphasis will be placed upon the management structure proposed for any subcontracting relationships. If the proposal includes subcontracting relationships, it is imperative that the contributions of each organization be clearly identified and the methods relied upon to ensure effective integration of activities be specified in detail. A subcontractor may augment, but may not supply the full expertise for, any of the six task areas of the contract.

4. Related Experience of the Company 15 points

The experience of the company as described in the proposal and past performance as documented in Contractor Performance Reports will be evaluated. Company experience must show substantial expertise in projects similar to that described in the RFTOP. The suitability of facilities and resources for performance of the proposed contract will be evaluated.

Total Weight 100 points

V. Special Requirements

1. Offerors should limit the size of their technical proposals to 50 pages of text. There should be 1-inch margins all around, and the font should be Arial 11 pt. or Times New Roman 12 pt.
2. To assure rapid response to changing program needs, and to assure adequate day-to-day management of complex activities that must be conducted in close concert with activities of NHLBI staff, other Federal agencies, and other contractors, the project staff of the successful offeror must be available to meet with program staff at the NIH in Bethesda with as little as 2 hours advance notice. The offeror must submit a plan to meet this requirement. Thus, offerors are required to submit evidence of the ability to obtain the necessary facilities, equipment, and personnel. The description shall identify those personnel who would be available. Also, the arrangement, whether firm or contingent upon award, for the rental, purchase, or other acquisition of resources necessary for the day-to-day operation shall be described and supportive evidence furnished for resources not yet functional.
3. Offerors shall provide their security policy and practices in their proposals. The security plan should follow format of the template set forth by the NIH CIT, which is available at <http://irm.cit.nih.gov/security/secplantemp.html>.
4. To assure rapid response to changing program needs, and to assure adequate day-to-day management of complex activities that must be conducted in close concert with activities of NHLBI staff, other Federal agencies, and other contractors, it is imperative that the offeror demonstrate convincingly for any proposed subcontracting relationships its ability to ensure responsiveness to the needs of the Institute and to maintain management accountability.

The extent to which any proposed subcontracting relationship is integrated into the offeror's proposal will be considered relevant evidence on this issue.

5. The NHLBI serves as the lead agency for the national research effort directed toward cardiovascular, pulmonary, and hematologic diseases, sleep disorders, and blood resources, and its communications are distributed widely with target audiences including the Congress of the United States, the Department of Health and Human Services, other Executive Branch Departments, the medical care and scientific research communities, and the public. Therefore, it is imperative that all materials and services delivered to the Institute be provided in a timely and accurate manner and that all materials leaving the Institute be error free and received by the proper audiences.

NHLBI Worldwide Web and Internet Applications

The NHLBI operates its own Web site and this is expected to continue. However, contractors host some subsites and special applications. These include:

- Asthma Management Model System (AMMS)
- NHLBI Healthy People 2010 Gateway
- Online Catalog
- Body Mass Index Calculator
- Menu Planner
- Applications for Palm OS devices
- May is National High Blood Pressure Education Month
- September is National Cholesterol Education Month
- Live Healthier, Live Longer (prevention component only)

The Online Catalog is the Web interface to the publications inventory database maintained by the contractor. The inventory database includes a brief description, pricing information, a thumbnail image, and other information on each publication. The Online Catalog dynamically displays the information from the inventory database base on user input. Users may add publications to a shopping basket by going to the descriptive page of a publication and selecting “Add to Basket.” Users cannot add publications from a list directly to the shopping basket. Instead, they must go the descriptive page and add it from there.

The Web page for each publication on the NHLBI Web site duplicates the information in the inventory database. Each publication page includes a link to the Online Catalog page for ordering. The Catalog page also link to the Web page where the user can view and download the publication if they choose.

Some of the subsites also contain pages or information on publications that duplicate information on the NHLBI Web site and/or the inventory database. The subsites duplicate the information so that it will appear on the subsite’s template.

The duplication of information means that when information changes, it must be changed in multiple locations. The duplication was initially necessary because of the early security and technological difficulty of sharing information between servers hosted by the Government and those hosted by contractors. Now, the NHLBI is taking steps to present a more consolidated Web interface to the public. Users will be able to “search” the entire NHLBI Web Site across all servers. The Web statistic program will also analyze the usage on all servers. Accordingly, the technology exists to “push” information from the inventory database to locations throughout the NHLBI Web Site.

The contractor also supports the NHLBI Web Site by:

- Maintaining a multimedia server for storing file
- Developing and hosting Web forms to collect user input
- Receiving and responding to comments and inquiries from the Web

The NHLBI does not have a multimedia Web server and rely on contractor support for storing all streaming video and audio files. Contractors also handle the conversion of media files into the appropriate format for the Web including compliance with Section 508 requirements.

Many of the subsites are built around active education campaigns. Collecting information from participants and/or partners is often an important part of the campaign. Frequently, partners input descriptions of their activities that are then displayed on the Web to share with others. The NHLBI has relied on contractors to develop and deploy these Web forms.

Many inquiries and comments from the Web site are received directly by the NHLBI Information Center via a special email account set up by the NHLBI (NHLBIinfo@rover.nhlbi.nih.gov). Other inquiries received by the NHLBI Web Coordinator are also directed to the Information Center as appropriate. The contractor stores the inquiries and comments in an inquiry response database and handle according to established procedures. They produce reports based on criteria established by the NHLBI staff responsible for the operations of the Information Center. However, reports on the nature and disposition of inquiries and comments originating from the Web are not made to the NHLBI and OPEC Web staff. The Web staffs are generally not aware comments and problems that are reported directly to the Information Center.

Many comments and inquiries received directly by the NHLBI Web Coordinator reflect a failed attempt to complete an order in the Online Catalog. This is significant because users must exit the catalog to find a link to the Web Coordinator. Links inside the catalog for reporting problems go to the Information Center. Thus, number of problems with ordering could be substantially since the NHLBI Web staff does not get reports from the Information Center on Web-related comments and inquiries.

Other general Web support includes the conversion of documents and other information in to Web-ready formats (HTML, PDF, XML, and other).

Diseases and Conditions Index

Under separate contracts, the NHLBI is developing a comprehensive Diseases and Conditions Index (DCI). The DCI include detailed information on diseases, conditions, and procedures related the areas of the NHLBI responsibilities. The information is written in plain language for patients and the public. One contract is to write content for up to 291 diseases, conditions, and procedures. The other contract built the Web infrastructure and is hosting the site. The infrastructure for the database-driven application was built using open-source code, i.e., LAMP (Linux + Apache + MySQL + Perl). Content pages are pushed out of the database as static HTML pages so they are visible to external search engines.

The NHLBI built the DCI as the core of the “Health Information Patients and the Public” section of the NHLBI Web site. It also includes templates to produce fact sheets from the content and features to assist information specialists in responding to inquiries. One template, a printer-friendly page, allow users to print a section or the entire content of a disease, conditions, or procedure as a text page without the graphic layout of the Web page. Another template will allow the NHLBI to create a fact sheet ready for commercial printing.

Security Requirements

All servers used by the contractor to host subsites and special applications and databases shall comply with the AISSP security requirements, the Computer Security Act of 1987; office of Management and Budget (OMB) Circular A-130, Appendix III, “Security of Federal Automated Information Systems;” and the DHHS AISSP Handbook. Access to data collected from users of the NHLBI Web site shall be restricted to staff with appropriate security clearance. To assure continuous compliance,

the contractor shall provide the NIH and NHLBI IT staffs with continuous access to scan the hosted servers for vulnerabilities and make correction identified by the NIH and NHLBI. The contractor shall also identify a contact person who is available 7 days a week and 24 hours a day that the NIH/NHLBI can contact if a Web page hosted by the contractor is defaced or if necessary in regard to any other security issue.

Task Order # PICS-163 **TITLE: NHLBI Health Information Center**
PART II - CONTRACTOR'S REPLY: CONTRACT #263-01-D-0_____

Contractor:
Points of Contact:
Phone: Fax:
Address:

TOTAL ESTIMATED COST: Pricing Method: CPAF
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 & ICS COORDINATOR

APPROVED: _____
FAX 301-435-6101 Signature –Anthony M. Revenis, J.D., NIH-ICS Coordinator Date