

**PUBLIC INFORMATION & COMMUNICATION SERVICES NIH – TASK ORDER**

RFTOP# 167

TITLE: NCCAM Clearinghouse

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

**A. ADMINISTRATIVE INFORMATION:**

Point of Contact Name:	Brian Goodger Contract Specialist <a href="mailto:goodgerb@mail.nih.gov">goodgerb@mail.nih.gov</a> 301-435-3787
Proposal Address: [U.S. Mail]	Research Contract Branch, OM National Cancer Institute 6120 Executive Boulevard Executive Plaza South Suite 600, Room 6039 Bethesda, MD 20892-7196
Proposal Address: [Hand Delivered]	Research Contract Branch, OM National Cancer Institute, Suite 600 6120 Executive Boulevard, MSC 7196 Bethesda, MD 20852
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**B. PROPOSED PERIOD OF PERFORMANCE:**

Base Period: August 15, 2004 - August 14, 2005  
Option 1: August 15, 2005 - August 14, 2006  
Option 2: August 15, 2006 - August 14, 2007

**C. PRICING METHOD: Cost Plus Fixed Fee (Term/Level of Effort).**

Offerors may propose a staffing plan that meets the work requirements laid out in this RFTOP.

The Government estimates that this statement of work will require approximately 56,180 hours per year, or 168,540 if all option years are exercised (total 3 years). Furthermore, the Government estimates that approximately 27 FTE's per year will be needed to fulfill this statement of work.

#### D. PROPOSAL INSTRUCTIONS:

Both technical and cost proposals shall be submitted in electronic format to Brian Goodger at the above e-mail address on or before the specified due date.

***Page Limit: Fifty (50) Pages, this includes text, charts, resumes, and exhibits. Please do not try to extend the page limit by reducing the font size or changing margins. The quality of the proposal is a reflection of your firm's ability to write, design, and prepare print and web-based products. The 50 page limit does not include the business proposal.***

Proposals should be organized by the evaluation factors. Do 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 contracts to judge your ability to carry out the tasks. The following list describes what we hope to see in each section of the proposal.

Please submit 1 electronic and 2 print copies of your proposal. Identify electronic proposals on the subject line of the email and by file name (example: RFTOP # XXX proposal from XYZ Company, item 1 of 3). You may prepare a web sample box of exhibits/forms/etc., rather than submitting them with the proposal.

Your firm has already qualified for this task order. Do not fill your proposal with boilerplate or unnecessary filler. Please be concise. Also, please do not include what was not asked for – additional resumes, an understanding of the problem, step-by-step instructions for performing a task, etc.

E. PROPOSAL DUE DATE: **March 23, 2004, 9:00AM EST** at the address specified for receipt of offers above.

Questions may be submitted to [goodgerb@mail.noh.gov](mailto:goodgerb@mail.noh.gov) up to February 24, 2004.

#### F. TASK DESCRIPTION:

##### I. PROJECT DESCRIPTION

The National Center for Complementary and Alternative Medicine (NCCAM) requires services from a contractor who can provide innovative, flexible, constructive management approaches to operate an information services program to inform the public and health care providers about the Center and complementary and alternative medicine (CAM) research at the National Institutes of Health (NIH). NCCAM requires results-oriented, experienced contractors that can provide quality services in a rapidly changing communications environment. Services include:

- Information clearinghouse functions
- Developing and disseminating educational materials
- Mailing services
- Exhibit program

## II. BACKGROUND

NCCAM's mission is to explore complementary and alternative healing practices in the context of rigorous science, train CAM researchers, and disseminate information to the public and health care professionals. See the NCCAM website for additional information about the Center. [www.nccam.nih.gov/about](http://www.nccam.nih.gov/about).

NCCAM's Office of Communications and Public Liaison aims to help people become active participants in their own health care by providing the latest scientific information on CAM in understandable language. The OCPL strives to develop partnerships with organizations, to interact with patients, health care professionals, and the public, to participate in health communications research, and to provide access to NCCAM information. The challenge associated with accomplishing these objectives, while working within budgetary and resource constraints, is not insignificant.

The NCCAM Clearinghouse is modeled on industry best practices and is committed to continuous improvement in customer service. The goals of the program are to capitalize on operational efficiencies, align processes and services with advanced technology, and ensure accountability.

Program objectives include:

- Provide access to and disseminate the latest, most accurate information on CAM and NCCAM to the public.
- Tailor information in response to the needs and expectations of the audience.
- Increase awareness of programs, products, and services of NCCAM.
- Increase the public's knowledge and understanding of CAM as it affects their health care decisions.
- Promote performance excellence in meeting the needs of diverse audiences.
- Use communications technology to expand access to information.

The contractor will be responsible for the day-to-day management of the NCCAM clearinghouse under the direction of the NCCAM Project Officer in the Office of Communications and Public Liaison (OCPL).

### 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 NCCAM's mission and the Center'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 on CAM for the public, patients and their family members, mass media, physicians, researchers, CAM health care providers, 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 CAM.
5. The contractor must have experience working with intermediaries to develop contacts with professional and lay organizations, CAM organizations, and other groups that are interested in this area.
6. The contractor must be able to develop, implement, and maintain computerized systems to support the information dissemination and outreach activities of the clearinghouse 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, in particular CAM on PubMed and other National Library of Medicine resources.
8. The contractor must have knowledge and experience sufficient to abstract, index, and maintain the Alternative Medicine subfile on CAM for the Combined Health Information Database (CHID).
9. The contractor must have knowledge and expertise sufficient to adapt and communicate technical information on CAM to diverse professional and lay audiences.
10. The contractor must have the capability to develop, design, implement, and evaluate (including preparing OMB packages) 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 have the capability to develop and execute creative/graphics work that is distinctive and of high quality in a variety of media.
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 contact center. The contractor is responsible for providing all equipment, furniture, supplies, and miscellaneous needs to operate the NCCAM clearinghouse. 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 NCCAM OCPL by telephone, in writing, and using electronic communication methods. Clearinghouse users include researchers, health care providers, educators, Federal and State program officials, the public, patients, and others.
3. The contractor must maintain the telephone services needed to operate the clearinghouse, including the toll-free telephone service (with voice mail, sufficient capability to meet demand, and toll-free TTY lines for hearing-impaired callers). 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 contractor must provide a dedicated, high-speed fax machine, for faxback and fax-on-demand capability and appropriate backup.
5. The contractor must have the skills and ability to maintain an extranet website.
6. The contractor must provide twice daily courier service, mail pickup, and delivery between the contractor's facility, the Project Post Office boxes, NCCAM/OCPL, and the NIH mail facilities located at 301 North Stonestreet Avenue in Rockville, MD. The NCCAM OCPL is located at 6707 Democracy Blvd., Suite 401, Bethesda, MD. The contractor will provide additional delivery services to other NCCAM facilities as required, including Building 31 on the NIH campus in Bethesda. The contractor will maintain the Post Office box for the clearinghouse.
7. The contractor must maintain the clearinghouse within the Washington, DC, metropolitan area. The clearinghouse must include sufficient space for all clearinghouse activities, including a library.

IV. SPECIFIC CONTRACTOR REQUIREMENTS

The major tasks of the NCCAM clearinghouse are as follows:

1. Project Management and Administration
2. Database Development and Management
3. Information and Referral
4. Staff Training and Quality Control
5. Product Development and Graphic Design Services
6. Clearinghouse Outreach and Promotion
7. Distribution, Inventory, and Warehouse
8. Exhibit Program
9. Mailing Lists
10. Transition Plan and Contract Closeout

#### Task 1. Project Management and Administration

In operating the clearinghouse, the contractor shall manage personnel, financial, and material resources to ensure that all requirements are met. Management success will be assessed throughout the contract by the Project Officer, based on the quality and effectiveness of the fulfillment of deliverables. The contractor shall:

- Assume responsibility for managing all aspects of the NCCAM Clearinghouse operations.
- Ensure that key staff and on-site staff are subject to the approval of the Project Officer.
- Adhere to guidelines and requirements for key staff positions.
- Have a full-time Project Director that will be the principal point of contact with the Government and will be responsible for the overall management of the project.
- Fill key staff vacancies within 3 months.
- Provide onsite staff support at NCCAM, as needed, and within the scope of work of the contract.
- 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 showing areas of responsibility and lines of authority.

#### 1.1 Quality Assurance

Quality assurance is expected in all areas of the contract to ensure that performance measures are met, the best possible service is provided, and there is continuous improvement in performance.

#### 1.2 Reports

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

- 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. 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 2.5 Extranet Website).

- Annual Reports. Thirty days after the end of each contract year, the contractor will submit a short annual report that provides an overview/summary of clearinghouse accomplishments during the year and summary data of all the major clearinghouse functions for the previous 12 months. These reports will include graphs demonstrating clearinghouse usage. They also will be submitted electronically and made available on the extranet website.
- 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 the clearinghouse 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 should include recommendations for future growth and direction.
- Special Reports. The contractor will respond to requests for data for the semi-annual commercial design and printing report as required by DHHS.

### 1.3 Data Management

The contractor shall collect data per guidelines and guarantee quality and accuracy of data.

The contractor shall:

- Use an inquiry tracking system to record data on all incoming requests.
- Use an inventory management system to track items in the warehouse.
- Have a plan in place for data backup and storage.

### 1.4 Facilities

Contractor shall:

- Provide adequate facilities for operation of the contract.
- Provide a diagram/layout of the office and warehouse space.
- All costs associated with an office move or renovation shall be the responsibility of the contractor.

### 1.5 Systems/Software

The contractor shall use applications and software to ensure consistent communication and data collection. Contractors shall:

- Provide connectivity and access to the Internet for all staff.
- Maintain connectivity and operating systems necessary to meet requirements of the contract.
- Provide support to maintain all systems.
- Provide and maintain a System/Data Security Plan.
- Ensure that staff have the skills and knowledge necessary to use the applications required for conducting the program.

- Adhere to Government policies and guidelines related to systems and software.
- Ensure that the Privacy Act is followed for all data and personal information that is collected.
- Maintain and refine a digital communications network and infrastructure that will
  - Enable the contract staff and NCCAM to work together efficiently
  - Allow NCCAM to quickly and cost effectively reach its audiences with timely and accurate information.

### 1.6 Telecommunications

The Government will furnish the toll-free lines and pay their costs. The contractor shall:

- Provide telecommunications equipment and software capable of providing recorded message, voicemail capabilities, call routing and triaging and other standard call center functions.
- Provide local area telephone lines.
- Provide TTY equipment.
- Provide fax-on-demand service.
- Suggest other options as technology evolves.

### 1.7 Security

The contractor is responsible for providing security for people, equipment, and documentation. 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, Appendix III. All security requirements apply to the contractor, all facilities, and any subcontractors.

- Controlled access. In general, facility access is limited to contractor personnel, authorized government personnel, maintenance staff or suppliers, and others on official business.
- Data center. Access to the data center should be secured.
- Physical security of telecommunications equipment and the security of the data collected is the responsibility of the contractor.

#### 1.7.1 Security Safeguards

- The contractor collects personal information about those who contact the Clearinghouse by telephone, writing, or email. This information includes, but is not limited to: name, address, telephone number, and email address. In addition, the contractor maintains mailing lists and listservs. The contractor shall adhere to all laws, regulations, and requirements that apply to the data being collected. The sensitivity of the data collected is designated Level 1, and the operational criticality of the data is also Level 1. 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 collected and stored.

#### 1.7.2 Security Certifications

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

## 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 clearinghouse as well publicly accessible databases. For example, NCCAM currently participates in the federally supported Combined Health Information Database (CHID) Alternative Medicine (AM) subfile, as well as [clinicaltrials.gov](http://clinicaltrials.gov), a searchable website of clinical trials. The contractor shall:

- Provide integrated online systems to facilitate the use of clearinghouse resources such as CHID, the clinical trials database, standard responses, resource directory, inventory, and the inquiry tracking system so they can be accessed easily and quickly by the staff.
- Regularly evaluate the current databases and systems, and 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 NCCAM Clearinghouse maintains the AM subfile of CHID, which contains approximately 300 records. The CHID database, including the AM subfile, is available at [www.chid.nih.gov](http://www.chid.nih.gov). The contractor shall:

- Be responsible for maintaining and expanding this resource.
- Work with the Project Officer and the CHID Board on user guides, surveys, and other resources that are meant to facilitate use of the CHID database by NCCAM staff and the general public.
- 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 2003, the fee was \$0.35 per record. These costs are paid from contract funds.
- On a quarterly basis (or more frequently if required), transmit error-free data of Project Officer-approved abstracts for the CHID Technical Coordinator to load onto the CHID website.
- Have staff capable of transferring data formatted to the CHID technical specifications for the AM subfile.
- Monitor the entries for accuracy and completeness.
- Attend CHID twice yearly board meetings.

### 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 CAM for health professionals, patients and their family members, and the general public. The contractor must identify CAM materials according to the subfile criteria.

Using established policies and procedures, the contractor shall:

- screen materials to determine whether they are appropriate for acquisition and acceptable for entry into the database.

- attempt to acquire at least one complimentary copy of all materials to be listed in CHID. Types of materials in the collection should include: government produced books, reports, 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 AM 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 100 documents per contract year.
- The abstracts will be submitted to the Project Officer for review quarterly.
- Rejection of more than 10 percent of the abstracts submitted shall be considered unacceptable work.
- The contractor will process all reference literature and materials for entry into the AM subfile of CHID.
- The contractor will maintain a computerized version of the 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 shall:

- Provide custom searches of CHID, CAM on PubMed, and other medical literature for NCCAM staff members and selected others. Custom searches also may be provided to health professionals and others who contact the clearinghouse.
- 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 NCCAM 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 searches will be made available in print format, if necessary

### 2.5 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, but are not limited to:

- Calendar of events/exhibits
- Inquiry tracking system
- Publication and archive inventories
- Graphics library
- Exhibit schedule
- Clearinghouse reports, including the annual publications and promotion plans
- Documents in development and status reports

- Staff alerts & CAM 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 shall:

- Respond to written, email, web live help, and telephone requests received in English and Spanish.
- Have information specialists knowledgeable about NCCAM publications and resources for inquiry response and distribution.
- Provide accurate, current information about CAM 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 shall:

- Use standardized responses, NCCAM publications, CHID and CAM on PubMed 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 use 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.
- Be capable of adding names to mailing lists or listservs, 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.
- Store/delete computerized data when it is no longer actively needed in compliance with NCCAM Records Management Guidelines.
- 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 in place when the contractor begins to handle inquiries after contract award.

#### 3.2 Standard Responses

Typically, the NCCAM clearinghouse responds to inquiries by using NCCAM publications, resources, and press releases. In addition, the information specialists use CAM on PubMed for searching published information.

- The specialists shall refer to guidance provided by the Project Officer on previous

- calls and questions.
- Information specialists also consult CHID, the medical literature, and NCCAM-approved web resources for more difficult questions.
- The NCCAM clearinghouse will 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 NCCAM and the clearinghouse, as well as letters forwarded from the OCPL and correspondence sent to other Government offices and directed to NCCAM for reply. The clearinghouse responds to an average of 300 written inquiries each month. 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 shall be completed within 3 working days of receipt.
- Personalizing a standard response can satisfy many of the inquiries received by the clearinghouse.
- Standard responses also are provided for those letters requesting information that can be found in existing NCCAM 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 shall:

- Respond to the concerns expressed in the inquiry, relying on previous correspondence, NCCAM publications, CHID and other databases, medical textbooks, journals, and reference files.
- Custom responses, which must be approved by OCPL, shall be completed within 5 working days of receipt.
- In consultation with OCPL, 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 Health and Human Services, or other Government officials and forwarded to NCCAM for reply. The contractor shall:

- Respond to the inquiry, obtain OCPL approval, and meet all deadlines specified in the directions from the NIH Executive Secretariat.
- OCPL 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.
- Prepare special requests such as speeches, talking points, proclamations, and other written materials as directed by the Project Officer.
- All requests from the media must be referred to the Project Officer or designated OCPL staff member for reply.

### 3.4 Telephone Inquiries

The contractor will operate a toll-free telephone number (1-888-644-6226) to respond to inquiries in English and Spanish about CAM and NCCAM. The clearinghouse responds to an average of 650 telephone inquiries per month.

- The telephone services will be staffed from 8:30 a.m. to 5:00 p.m. eastern time, M-F except Federal holidays.
- The contractor will analyze call volume periodically to assess whether extending the phone service hours is needed.
- Outside regular business hours or for emergencies, 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 toll-free number will be used regularly in special promotions.
- The contractor will present a cost-effective strategy to handle fluctuations in call volume.

#### 3.4.1 Standard Telephone Responses

Information specialists will respond to telephone inquiries promptly, accurately, clearly, and courteously.

- Many inquiries will be handled by sending NCCAM publications; some, however, will be answered using a combination of NCCAM publications, standard responses, CHID and other databases, and referrals to other government clearinghouses.
- All telephone inquiries will be documented by a tracking system and responded to at the time of the initial call. Call-backs should be minimal.

#### 3.4.2 Custom Telephone Responses

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

#### 3.4.3 Congressional 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.

#### 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 and Web Live Help Inquiries

To respond to e-mail and live help messages, the contractor will rely on standard responses, NCCAM publications, CAM on PubMed and other databases, medical textbooks, journals, reference files, and previous correspondence. The contractor shall:

- Respond to e-mail/live help requests for publications, questions from visitors to the NCCAM website, and e-mail requests sent to NCCAM directly.
- Provide staff to respond to inquiries of a technical nature that are generally sent to the Web Master.
- Respond to inquiries forwarded from or through the Project Officer. Responses are classified as either standard responses or custom e-mail messages.
- E-mail requests will be handled using the same procedures followed for written requests.
- Live help requests will be handled using the same procedures followed for telephone requests.
- Standard responses are provided for those e-mail/live help messages requesting information that can be found in existing NCCAM materials. The contractor will monitor and respond to publication requests in e-mail/live help messages and all orders received via the interactive online publications ordering system.
- The clearinghouse responds to approximately 300 e-mail requests per month. E-mail volume is expected to increase each year.
- Standard e-mail responses will be completed within 2 working days of receipt.
- Live help responses will be completed in real time.

#### 3.5.2 Custom E-mail/Live Help Responses

The contractor will write a custom message addressing the concerns expressed in each e-mail/live help 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 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 OCPL for approval.

### 3.6 Referral

The contractor will follow NCCAM's policy regarding referral to outside resources. Currently, NCCAM's policy is to use the National Library of Medicine's Dirline as the primary tool for referring callers to organizations that provide information about CAM research, treatment, and services. Resource organizations are defined as NCCAM-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.

#### Task 4. Staff Training and Quality Control

The contractor will be responsible for recruiting and training qualified personnel to respond to inquiries. The contractor also will be responsible for continuously monitoring, evaluating,

and improving the services of the clearinghouse.

#### 4.1 Training Plan

The contractor shall:

- Design and implement a staff training program to ensure the effectiveness of the clearinghouse. This training program should include knowledge about DHHS, NIH, and NCCAM; and basic information about CAM.
- Include the operating policies and procedures of the clearinghouse, computerized tracking systems, standard responses, materials available in various databases, and referral resources.
- Training in the subject of CAM must include sources of information on the domains of CAM, and their uses in prevention and treatment, ongoing research, and topics of media interest.
- 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.

#### 4.2 Initial Training

The purpose of initial training is to prepare new staff to perform their duties as knowledgeable representatives of NCCAM. 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 inquirers.

#### 4.3 Continuing Education

Continuing education is training designed to build skills, enhance knowledge, and improve job performance. To maintain high-quality responses to inquiries, the contractor staff will have continuing education training on a regular basis.

- At a minimum, continuing education will occur quarterly.
- Continuing education activities may include updates on developments in CAM research, publications, resources, information and referral resources, skills development, specific aspects of CAM, research advances, and any other topics relevant to inquiry response.
- Contractor staff members are encouraged to attend NCCAM lectures and conferences that deal with relevant subject matter.

#### 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 and monitoring by information service management.

- 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.
- A plan for monitoring of staff performance is required.

## Task 5. Product Development and Graphic Design Services

The contractor shall plan, research, write, design, test, and produce publications and materials needed by NCCAM, including multimedia presentations. The contractor shall:

- Perform all writing and editing functions, draft clearances, develop appropriate graphic treatments, and assume responsibility for all tasks related to product development.
- Write and/or edit articles, pamphlets, brochures, newsletters, annual and congressional reports, fact sheets (NCCAM products include “Get the Facts,” “Research Reports,” and “Herbs at a Glance” series), technical publications, research highlights, directories, bibliographies, posters, promotional pieces, press releases, and announcements of new publications.
- Produce materials in English and Spanish.
- Prepare products that are based on scientific studies, that exhibit a thorough understanding of the material, that are written in Plain Language and are appropriate for the intended audience, and communicate objectively, clearly, and effectively.
- Prepare a publications plan for the clearinghouse at the beginning of each contract year. The publications plan will be developed in conjunction with promotion plans (see Task 6) 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.
- Submit the first publication plan 60 days after contract award and at the same time in each subsequent year of the contract.
- The publications plan will be developed in consultation with the OCPL. The plan shall include updating/revising existing materials as well as new projects.

### 5.1.1 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 if necessary. Each publication clearance will contain the information required in DHHS Form 615. A sample is available at: [www.nih.gov/od/ocpl/resources/HHS615.pdf](http://www.nih.gov/od/ocpl/resources/HHS615.pdf). 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.

## 5.2 Publications Quality Control

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

### 5.2.1 Publications Tracking and Archive System

The contractor shall develop a tracking and archive system for NCCAM publications.

- Given the number of publications and diversity of formats, the contractor must maintain records of the status of each publication as it moves through the development process and post it on the extranet.

- 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.

#### 5.3.1 *Get the Facts and Research Reports Series*

The contractor will produce and print up to 10 new fact sheets each contract year. Samples are available on the NCCAM website. New topics will be selected from the publications plan developed in consultation with OCPL staff.

The contractor shall:

- Translate selected new and revised fact sheets into Spanish as they are produced. Samples of Spanish language fact sheets are available on the NCCAM website.
- Develop and maintain a tracking system and post on the extranet to monitor the progress and status of each fact sheet to ensure that the latest versions are available on the web and in print.

#### 5.3.2 Outreach Materials

The contractor must be able to conceive, develop, and produce creative materials to promote NCCAM 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 6).

- Basic promotional materials may include a rolodex card, a brochure describing NCCAM, and a publications list.
- Other outreach materials might include flyers, radio and television PSAs, and print ads.
- Special promotional materials, such as exhibit giveaways, will be developed when they are needed and it is cost effective to do so.

#### 5.3.2 *CAM at the NIH* Newsletter

The contractor will produce 4 issues of *CAM at the NIH* newsletter each year.

- The contractor will write, produce, and distribute the quarterly newsletter, *CAM at the NIH*. This 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.
- The Project Officer will review the newsletter at each stage of production.
- Samples of recent issues are available at [www.nccam.nih.gov](http://www.nccam.nih.gov).

### Task 6. Clearinghouse Outreach and Promotion

The contractor will develop, write, and submit an annual promotion plan for the clearinghouse, its products, or services.

- The plan will identify target audiences and outline specific plans for promoting awareness of the products and services of NCCAM.
- It is expected that two special promotions will occur annually.
- The promotion plan will be written in conjunction with the publications plans (Task 5).
- The first promotion plan will be submitted 60 days after contract award and at the same time in each subsequent year of the contract.

#### Task 7. Distribution, Inventory, and Warehouse

- The contractor will be responsible for distributing, tracking, and warehousing all NCCAM 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 NCCAM 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 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 NCCAM facilities as required.
  - The contractor will maintain the Post Office box for the clearinghouse.

The current inventory consists of approximately 85 titles. More than 70,000 publications are stored in roughly 750 square feet of warehouse space. The NCCAM publications and any other property will be transferred upon award.

##### 7.1 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 NCCAM and will not be billed to the contract.

##### 7.2 Special Distributions

The contractor also may be asked to mail pamphlets, brochures, kits, special bulletins, and other items not normally stocked in the warehouse.

- The contractor will provide local pickup and delivery of these materials through the NIH mailroom.
- Postage will be paid by NCCAM.

### 7.2.2 Newsletter Mailing

The contractor will label and mail each issue of CAM at the NIH (4 mailings per year to an estimated 7,000 names).

- The contractor will use the NCCAM postage permit for mailing.
- The contractor also will send a quarterly e-mail alert to an “on-line mailing list” of approximately 2,000 users.

### 7.2.3 Other Mailings

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

## 7.3 Inventory

The contractor will store all designated NCCAM 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. 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.

### 7.4.1 Archives Inventory

At contract award, the contractor will receive the NCCAM 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 staff may need to locate materials from the archives. Therefore, the contractor will develop and maintain a record of “box storage” for audiovisual materials, artwork, and archival documents.

## 7.5 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, 1,000 square feet of storage space will be required in addition to space for fulfillment.

- 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 publications and equipment against damage such as fire, flood, and theft.

## Task 8. Exhibit Program

### 8.1 Exhibit Development and Maintenance

The contractor will develop the components of a successful exhibit program for the clearinghouse.

- At the beginning of the contract, and annually thereafter, the contractor will evaluate the appropriateness, effectiveness, and physical condition of the exhibits and make recommendations to the Project Officer about their findings.
- The contractor will complete all aspects of redesigning the 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 the clearinghouse will be needed over the life of the contract.
- Modular 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 modular exhibit annually and make recommendations to the Project Officer about their findings.
- The contractor will complete all aspects of redesigning the modular exhibit 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 modular exhibit will be needed over the life of the contract.

### 8.2 Exhibit Outreach and Promotion

The contractor must be capable of promoting and tracking the exhibit outreach activities on an ongoing basis. The contractor shall:

- Develop a plan to reach out to defined target audiences, identifying and contacting potential exhibit opportunities through informational materials, attending key meetings and conferences, distributing descriptive materials to individuals or trade publications, and carrying out other outreach and promotion activities when the budget permits.
- For planning purposes, the contractor should assume 4 local and 10 out of town exhibit opportunities per year.

### 8.4 Conference and Exhibit Attendance

The contractor will identify national professional conferences and meetings

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.
- The contractor will register NCCAM 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 exhibit except when the Center submits only materials for display.
- 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. NCCAM 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.

#### Task 9. Mailing Lists

The contractor will compile and maintain up-to-date, accurate print and email listserv mailing lists for the newsletter, NCCAM Update (email alert service), and other lists as may be identified by the Project Officer. Sample mailing lists include representatives of key intermediary groups and designated target groups, media, newsletter subscribers, NCCAM senior staff, and advisory council members. Currently, there are approximately 10,000 entries in various categories.

The contractor shall:

- 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.
- The contractor shall promote the mailing lists and listservs at exhibits, meetings, and other outreach events.

#### 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 Post Office boxes, and transfer of property, files, and all government-furnished equipment.

#### 10.1 Transition Plan

During the first month of the project, operational responsibilities shall be assumed from the incumbent.

- The contractor shall develop and implement a plan for transition of operations from the incumbent.
- The contractor shall meet with the Project Director to discuss transition upon contract award.
- As part of the transition, the new contractor will conduct a complete inventory of publications, equipment, 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.

At the end of the contract, the contractor will develop a detailed plan to transfer to the new contractor, as directed by the Project Officer, all NCCAM materials.

- Participate in transition planning
- Ensure that ongoing project tasks continue until the new service provider assumes responsibility.
- Materials will include items such as reference and program files, existing databases, software, and equipment that are integral to the operation of the clearinghouse.
- 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.

#### 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.

#### V. SPECIAL REQUIREMENTS

- To ensure rapid response to changing program needs, the project staff must be available to meet with NCCAM in Bethesda, MD with as little as 2 hours notice.
- Offerors shall provide their security policy and practices in their proposals. The security plan should follow the format set forth by NIH CIT at <http://irm.cit.nih.gov/security/secplantemp.html>

## G. EVALUATION FACTORS:

The technical proposal will receive paramount consideration in the selection of the Contractor for this Task Order. All evaluation factors, other than cost or price, when combined are significantly more important than cost or price. However, cost/price may become a critical factor in source selection in the event that two or more offerors are determined to be essentially equal following the evaluation of all factors other than cost or price. In any event, the Government reserves the right to make an award to that offeror whose proposal provides the best overall value to the Government.

Each Offeror's proposal is evaluated according to the factors shown below. Factors A, B, C, and D are of equal importance. Sub-factors listed under each factor are of equal importance to each other.

### Factor A: Management Approach to the Project (25%)

The operation of the NCCAM Clearinghouse represents a number of challenges, and will require skill to operate with quality customer service and cost effectiveness. Offerors will be evaluated on their ability to present a sound and thoughtful approach to the challenges that are specific to this project. For pricing purposes, we have provided a detailed statement of work that specifies the tasks to be accomplished. Do not provide an approach for each task. Identify the key challenges to operating the NCCAM Clearinghouse. Describe how you address the challenges, any special expertise you bring to the project, and where the project will be located; provided layout and space allocations.

### Factor B: Key Personnel (25%)

Provide resumes for the management team only. These may be current staff or contingency hires. Do not include corporate officers as key personnel, unless they will have a substantive role in the project. Do not include resumes for other staff or subcontractors.

Include an organization and staffing chart. The chart should reflect your approach to management of the tasks and clearly show lines of authority and responsibility.

The staffing chart should be organized by job category only, showing lines of authority and estimated FTE's for each position (example: Project Manager (1) information specialist (2.5)). It is not necessary to specify the names and include resumes for non-key personnel.

### Factor C: Corporate Experience (25%)

Offerors will demonstrate their qualifications for operating the NCCAM Clearinghouse by providing information for no more than 5 highly relevant examples of recent contracts.

Provide the information in chart form including the following information: client (name, address, telephone and email); period of performance; percentage of effort on that contract for each task in this RFTOP. Narrative is not needed.

### Factor D: Cost (25%)

Cost is important, but is not the sole factor in determining the winning proposal. The contract will be priced as a cost reimbursement term/level of effort type 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 cost of the contract should be a realistic assessment based on the required tasks and the quality of staff needed to accomplish

those tasks. Along with other evaluation factors, cost will be used to determine which proposal represents the best value to the government.

Costs specifics should be included in the business proposal only.

Task Order# NICS-167

TITLE: NCCAM Clearing House

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

Contractor:  
Points of Contact:  
Phone:  
Address:

Fax:

TOTAL ESTIMATED COST: Pricing Method: CPFF  
TOTAL ESTIMATED NUMBER OF HOURS:  
PROPOSED COMPLETION DATE:

FOR THE CONTRACTOR: \_\_\_\_\_  
Signature Date

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**SOURCE SELECTION:**

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

Billing Reference # \_\_\_\_\_  
Appropriations Data: \_\_\_\_\_

RECOMMENDED:

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FAX #	Signature - Project Officer	Date
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APPROVED: \_\_\_\_\_  
FAX # \_\_\_\_\_ Signature - Contracting Officer Date

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**NIH APPROVAL -**

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

APPROVED: \_\_\_\_\_  
FAX 301-435-6101 Signature –Anthony M. Revenis, J.D., NIH-PICS Coordinator Date