



HRSA-04-N234-5023ms

DEPARTMENT OF HEALTH AND HUMAN SERVICES Public Health Service
Health Resources and Services Administration, Rockville, MD 20857

July 28, 2004

TO: NIH Public Information and Communications Services(PICS), Indefinite Delivery Indefinite Quantity (IDIQ) Contractor(s)

RE: Request for Task Order Proposals 04-N234-5023ms, - Project entitled " Communications and Conference Support for the Yield Strategy, Spread Strategy, and 2nd Collaborative of the Organ Donation Breakthrough"

The Health Resources and Services Administration (HRSA) is contemplating issuance of a Task Order under the NIH Public Information and Communications Services(PICS) indefinite delivery indefinite quantity (IDIQ) contract. We anticipate awarding a cost plus fixed fee type task order. The resulting task order will be in accordance with the terms and conditions of the offerors PICS contract. Your organization is being invited to submit a proposal in accordance with the requirements set forth in the attached Request for Task Order Proposal (RFTOP) number HRSA-04-N234-5023ms. Please note that the Government reserves the right to cancel this solicitation at any time for any reason.

A deadline for any questions pertaining to this package, is August 2, 2004 at 2:00 p.m., eastern local time. Questions for which you require clarification by the Government, must be furnished in **writing**, preferably by "e-mail" to the following three email addresses: mchecchia@hrsa.gov, mskinner@hrsa.gov and a courtesy copy forwarded to Ms. Renee Dupee, rdupree@hrsa.gov. Your questions must be e-mailed, or faxed in sufficient time to be received in the Contracting Office on August 2, 2004 at 2:00 p.m. or before **this due date** in order to allow sufficient time for a reply to be provided to all prospective Offerors prior to submission of their proposals.

Acknowledgment of any amendments and the receipt of one (1) original and four (4) copies of your proposal must be received in the Contracting Office, on the due date, which is no later than **4:00 p.m., local time, August 10, 2004** at the following address:

DHHS, Health Resources and Services Administration
5600 Fishers Lane, Parklawn Building, Room 13A-19
Rockville, Maryland 20857
Attention: RFTOP No. **HRSA-04-N234-5023ms**

NOTICE: ACCESS TO PARKLAWN BUILDING

The Parklawn Building is a controlled access building. Therefore, you should allow ample time for visitor access. It is your responsibility to ensure that proposals are delivered by the due date and time, and specific place (Room 13A-19) as required in the solicitation. Please be advised that late proposals will not be excused due to increased security measures (see FAR provision 52.215-1(c)(3) - "*Submission, Modification, Revision, and Withdrawal of Proposals.*") Please review this provision so that you will be fully aware of the time requirements for submitting your proposal. Offerors delivering boxes of proposals must use the delivery entrance located on the loading dock, which is accessible from Parklawn Drive. All

packages will be x-rayed by a security guard. Visitors will be required to provide photo identification and provide a name and telephone number of the individual being visited, (in this case, Mary Jean Skinner, 301-443-2732 or Mario Checchia on 301-443-3098, 301-443-2730, 301-443-2750 or 301-443-1433).

You will then need to personally bring the boxes to Room 13A-19 (13th Floor, A-Wing, Parklawn Building.) Boxes of proposals should NOT be left on the loading dock. ***To facilitate the delivery of the proposals, you may want to send your proposals via any of these US carriers: US Postal Service, FedEx, and/or UPS. The couriers of these carriers have access to the Parklawn Building and do not require to be escorted into the building.***

Your proposal must be prepared in accordance with the following Attachments and Worksheets. This RFTOP does not commit the Government to pay any costs for the preparation and submission of a proposal. The Government reserves the right to cancel this RFTOP at any time. It is also brought to your attention that the Contracting Officer is the only individual who can legally commit the Government to the expenditure of public funds in connection with this proposed acquisition.

A transmittal letter, accompanied with your proposal, must contain the name of a representative who is responsible for negotiating, and is authorized to commit, and answer questions on behalf of your organization. Please include an e-mail address and phone number, your company name and complete address, including street, city, county, state, zip code, Tax Identification Number (TIN), and Dun & Bradstreet Number (DUNS). Please note that FAR 52.204-6 Contractor Identification Number Data Universal System (DUNS Number) requires you to submit a DUNS number for your company along with your offer. If you do not have a DUNS number, you are requested to contact Dun and Bradstreet Information Services at 1-800-333-0505 to obtain one. Please include this information, along with the TIN, on the transmittal letter and on the first page of your business proposal. If the address is different from the address to which payments to your organization should be mailed, you must also include the complete payment address.

Any telephone contact regarding this RFTOP should be referred only to Ms. Mary Jean Skinner at 301-443-2732 or Mr. Mario Checchia, at 301-443-3098. Please note too that any discussion, regarding this solicitation with individuals other than staff in the HRSA Contracts Office may result in rejection of a prospective Offeror's proposal.

Sincerely,

Mario Checchia
Contract Specialist

Enclosure:

- Attachment A - Description/Specifications/Work Statement
- Attachment B - Articles or Services to be Delivered and Delivery Time
- Attachment C - Technical Proposal Instructions and Evaluation Criteria
- Attachment D - RFTO Proposal Instructions
- Attachment E –Past Performance Information Survey Questionnaire
- Attachment F – Sample Cost Element Summary
- Attachment G – Schedule of Conferences

ATTACHMENT - A

DESCRIPTION/SPECIFICATIONS/WORK STATEMENT

GENERAL. This Statement of Work (SOW) describes the requirement for conference and communications support contractor. Its purpose is to provide logistical and other support in sustaining and expanding a national effort to increase organ donation in the nation's largest hospitals based on the progress, work and input that resulted from Secretary Thompson's Organ Donation Breakthrough Collaborative.

PURPOSE of CONTRACT. This contract shall provide the conference and communications support by holding the gains of the Organ Donation Breakthrough Collaborative and spreading known best practices to the 800+ largest hospitals in the nation where 90% of potential donors originate. The goal of the Collaborative is to achieve organ donation rates of 75 percent or higher in these hospitals.

SCOPE. The Contractor shall produce a General Plan that provides information on the accomplishments of the tasks of this Contract. The format to be followed in preparing the General Plan shall be based upon the guidelines of the National Institutes of Health Publications, Information Communications Services Request for Task Order Proposal.

CONTRACTOR TASKS.

Task 1: PROJECT OFFICER (PO) MEETING WITH CONTRACTOR

- 3.0.1. The Contractor shall meet with the PO and DoT Collaborative team, in person, within (7) seven days of the effective date of the contract (EDOC). The meeting shall take place with the PO to discuss the scope of contract, including but not limited to: goals and objectives, processes, time frames, priorities, budgetary issues, site requirements, travel for speakers and logistics, deliverables related to the work to be performed and other related activities of the contract.
- 3.0.2. Based upon discussions at the initial PO meeting (see Task 1 §3.0.1.), the contractor shall submit a revised work plan with a meeting checklist and anticipated deadlines reflecting all agreed upon outcomes of the discussions.

Task 2: COORDINATION OF MEETINGS

- 3.0.3. There shall be a planning meeting with the contractor prior to each meeting, date TBD by PO. The meeting schedule is listed after Task 7.
- 3.0.4. Contractor shall develop a planning report for each meeting for use as a guide in managing the meeting.

Task 3: SITE SELECTION, LODGING AND TRAVEL ACCOMMODATIONS

- 3.0.5. Contractor shall locate, in concert with the PO, a conference site for each of the meetings. The contractor shall submit not less than (3) three possible sites for lodging and/or meeting space, in the meeting city to be determined, to the PO for selection. Sites submitted must be within per diem rates for specified areas. The contractor shall arrange with that facility for hotel sleeping and meeting rooms, equipment, furniture and other support necessary for the execution of these meetings, including any and all video and audiovisual equipment (all costs shall be borne by the contractor.) Dates and locations for these meetings shall be discussed during the initial meeting with the PO and other Federal staff.
- 3.0.6. Contractor shall arrange for and reimburse airfare for all speakers, Faculty and the Leadership Coordinating Council and other designated individuals as specified by the PO. (These are included in the matrix under Requirements for each meeting,)
- 3.0.7. Contractor shall arrange for on-line registration for meetings and hotel accommodations. Contractor shall provide participants with hotel reservation confirmation. Contractor shall be responsible for investigating and resolving hotel/meeting reservation /confirmation issues. Contractor must be able to report to PO, at anytime, the number of attendees registered and have the capability of searching for specific participants.
- 3.0.8. Contractor shall contact participants to inform them of/confirm each meeting's location and dates. Secure the necessary paperwork to confirm their participation, travel dates, and needed accommodations.

Task 4: MEETING PREPARATION AND MATERIALS DISSEMINATION

- 3.0.9. Contractor shall maintain and update a database of the participants, speakers, and Federal staff of the meetings. The database should contain participant names and partner organization and any additional data needed to perform various tasks, including but not limited to the following:
- maintaining a mailing and/or email list/list-serve for all participants for each group meeting.
 - producing mailing labels and sending electronic communications
 - customizing correspondence
 - Duplicating, distributing materials and/or files electronically prior to and during each meeting, as needed and mailing invitations and meeting information to participant at least 30 days before each meeting as directed by the PO.
- 3.0.10. Contractor shall provide nametags, nameplates, blank note pads, pens and other necessary items for participants. Also provide signs and nametags for other attendees.
- 3.0.11. Contractor shall prepare binders and/or packets of information for participants and other attendees to be distributed at each meeting. Packet contents shall differ among meetings.

- 3.0.12. Contractor shall contact PO at least 4 weeks before each scheduled meeting to review all pre-meeting activities, resource materials for participants and to discuss other pre-meeting considerations, as necessary.
- 3.0.13. Contractor shall provide PO with a roster of all participants and speakers, including all their contact information. The contractor shall email (or mail only if email not available) each meeting participant and invited speaker a meeting invitation for each meeting. Included with this meeting invitation shall be an attendance confirmation sheet to be mailed back by the participant and speaker.

Task 5: ARRANGEMENTS FOR SPEAKERS

- 3.0.14. Contractor shall, when contacting speakers, request and obtain a one-page biosketch and any material for their presentation or handouts for the meeting.
- 3.0.15. Contractor shall confirm Speaker's per diem, local transportation and honorarium. Speakers shall be paid a maximum honorarium of \$500.00 per day unless previously approved by PO. Speakers shall be reimbursed in accordance with Federal Travel Regulations.
- 3.0.16. Contractor shall complete all reimbursement costs to the sponsored speakers within 30 days of receiving their completed reimbursement requests.

Task 6: COORDINATION OF DIFFERING COMPLEX TECHNICAL SERVICES

In order to complete this contract, it is anticipated there are some very specific, intensive and complex service needs that must be met. Therefore, the Contractor shall need to coordinate various types of services to carry out these requirements. The contractor shall coordinate these services with the Project Officer, the HRSA Office of Communications and the HRSA, OIT. The following is an example of the varied services required under this contract.

Audiovisual Support

- 3.0.17. Contractor shall coordinate to provide audio/visual assistance and video production created in conjunction with the Spread Strategy and 2nd Collaborative. These efforts shall be coordinated through the Project Officer and with the HRSA Office of Communications and the HRSA IT office. The Contractor will be responsible for the following:
- Management services to coordinate
 - On-location video/film crews to record interviews, b-roll, activities, etc. to be used as inserts for the collaborative meetings.
 - Post production services to edit and prepare graphics to finish elements to be used as inserts for the collaborative meetings.
 - Creative and technical services and labor associated with staging the

- Collaborative meetings including coordination of vendors and suppliers and the venue.
- Identify and coordinate the activities of local A/V suppliers and crews. Provide a Producer-Project Manager to oversee all activities associated with pre-production and staging of the Collaborative events.
- Creative services to:
 - Assist in the design and development of program content.
 - Work in collaboration with DoT principles and SME's to prepare videotapes and graphics that meet the expectations of the targeted participants and the goals and objectives of the Collaborative.
 - Design and develop graphics for inclusion in the program including providing assistance and guidance in presentation preparation and speaker coaching.
 - Provide a Stage Manager to direct the Collaborative events.
- Technical services to
 - Create technical specifications and CAD drawings related to the set-up and staging of the Collaborative events.
 - Provide an on-site Technical Producer to oversee all A/V and staging related activities for Collaborative events.

3.0.18. Contractor shall provide video satellite teleconference communications and other distant learning technologies for various meetings during the length of the Spread Strategy and 2nd Collaborative.

The Contractor must organize and coordinate 5 full day satellite videoconferences.

The contractor must provide:

- An always-accessible Production Management Process system designed to identify and manage all services and activities associated with the event.
- Consulting services to assist the DoT team design meetings that maximize the use of distant learning, best practices and technology for interaction, exercises, assessments, off-air activities, etc.
- A production and networking team to assist the DoT tem throughout the project.
- Management of all production related activities associated with staging and telecasting the event at the origination-host site.
- Coordination and technical assistance to other production and networking contractors providing feeds into the main telecast.
- Transmission services including up-linking, space segment, down-linking, bridging, streaming and other related services associated with satellite, videoconference and web-casting.
- A help desk and technical operations center with a frequency agile downlink and specialists who can assist with and troubleshoot downlink problems as well as coordinate downlink and uplink satellite capabilities.
- A help desk and technical operations center to assist users when webcasting and video on demand technology is used to deliver content.
- Creative support services to assist in the design and development of graphics,

- animations, videos, set design, etc.
- Assistance in providing captioning and other media based services to ensure 508 compliance.
- A production staff including a writer, producer, director, technical producer and technicians specializing in telecasting of live multiple site two-way video-audio events via satellite, videoconference and webcasting.

The contractor must demonstrate extensive and substantial experience in designing, developing and delivering highly complex, high profile hybrid events. Evidence of past work includes:

- Demonstration of the contractor's accessibility to the Project Officer or designee
- Industry recognition
- Sample reels
- References

Conference Call Communications

3.0.19. Contractor shall provide conference call communications for various groupings of participants and members of the DoT team during the length of the Spread Strategy and 2nd Collaborative. The contractor must provide operator assistance with separate "call rooms" for leader group and participants. There will be regularly scheduled weekly calls between DoT team members, Faculty and consultants. There will be between 30 and 35 calls during the course of the contract lasting approximately 60 minutes each. These calls should be able to accommodate 250 participants from various United States locations. A continuous access to conference call for routine weekly and other unanticipated conference calls among faculty and DoT Team members shall be provided.

Knowledge Sharing

3.0.20 Contractor shall provide technical work to establish and maintain an integrated knowledge sharing and database management system in coordination with the Project Officer, the HRSA Office of Communications and the HRSA OIT.

The system will consist of at least three closely and inter-related parts, including:

Part 1 is a format, process, software and website for systematically collecting and organizing information from 200 to 300 organ procurement organization (OPO) and hospital teams. This information will be comprised of 1) *specific strategies, 2) *change concepts, 3) *tests/actions conducted by teams as part of their work to rapidly increase organ donation rates in their organizations and 4) **quantitative results from teams. The information needs to be formatted, collected and displayed in an easily searched web-hosted database that permits each of the other teams to quickly and easily identify others who have conducted successful tests/actions in certain topic areas, so that they can experiment with and replicate these tests/actions in their own organization. An existing website created and managed by the Institute for Healthcare Improvement at

<http://www.qualityhealthcare.org/ihl> provides an excellent example of what this element of the planned system could ultimately look like.

Part 2 The “Gardener” is a highly knowledgeable and influential person who will systematically and regularly “mine” Part 1 above to identify key strategies, concepts and tests/actions that should be considered for implementation by the 200-300 teams and an additional 700+ of the nation’s largest hospitals. This gardener will 1) routinely extract nuggets of information from Part 1; 2) disseminate these nuggets across a group of Spread Leaders with accountability for the national system; and, 3) track the use and results of these nuggets by the Spread Leaders and 900+ organizations who can put them to use.

Part 3 is the format, process, software and system for tracking the dissemination, consideration, testing, use and results of the “nuggets” that are pushed out by the person serving as our “gardener.” We want to know what happens to the information that is being pushed out by the gardener. The format for tracking and displaying some of the information collected from the Spread Leaders and their 900+ organizations could ultimately look something like the table on the next page:

Action	Spread Leader	N/A Here	Not Interested	Being Tested	Being Implemented	Implemented
Clinical Trigger Card	WRTC, Jane Doe	Applies		Began Testing on 4/25/2004		
DCD	HI OPO, John Doe	Applies		Began Testing on 2/20/2004	1 st Successful DCD Donor in 3/2004	Standard Practice as of 4/25/2004

All Spread Leaders and their corresponding 900+ organizations would have real-time access to the individual and collective current status of their tracking and results information via the Internet. This data shall have the capability of being viewed, at any time, in a viewer friendly format in real-time. The data shall be rolled up into specified reports upon entry of new data.

The contractor will be responsible for the development, operation and maintenance of Parts 1 and 3 above. HRSA’s Division of Transplantation will be responsible for Part 2.

The contractor must meet the following requirements for the development and maintenance of a HRSA website:

Section 508. All federal web sites must be compliant with Section 508 of the Rehabilitation Act of 1973, as amended, effective June 21, 2001 and thereafter. Federal web sites in this context include any and all sites owned or operated by the agency and/or developed and/or maintained with Federal funds.

Domain name. HRSA web sites must be hosted on agency servers except in very rare

cases in which unusual security requirements or other special concerns favor hosting outside the agency. In those cases, program must work with HRSA OIT to decide if the hosted site will have a HRSA domain name, ie. a hrsa.gov URL.

Department Identity. All web pages developed for HRSA shall identify HRSA, its parent and the U.S. Department of Health and Human Services. The sponsoring HRSA program may also be identified, but no other corporate identity (eg., logo, icon) is allowed.

External Links. All links to non-U.S. Government Web sites should be clearly identified with a disclaimer. Relevant information sources in the government space must be provided before commercial links are provided and the use of links to commercial sites must be minimal and justified.

Persistent Cookies. All HRSA web sites are prohibited from using persistent cookies.

Privacy. All HRSA web sites must disclose the use and disposition of any personal information collected.

Security. The contractor shall address OIT security concerns throughout the software development lifecycle. The completion of system security plans is a requirement of the Office of Management and Budget (OMB) Circular A-130, *Management of Federal Information Resources*, Appendix III, *Security of Federal Automated Information Resources*, and Public Law 100-235, *Computer Security Act of 1987*.

In addition, the contractor shall:

- Prepare a Data Sensitivity Questionnaire to determine the sensitivity level and establish the information security practices and procedures commensurate with the sensitivity level. Definitions for the sensitivity level and guidance on determining levels can be found in the [Federal](#) Information Processing Standards (FIPS) Publication 199 and the US Department of Health and Human Services Risk Assessment Guide. FIPS Publications can be found at: <http://csrc.nist.gov/publications/fips/index.html>. HHS guides will be provided HRSA's Office of Information Technology (OIT).
- Participate in a Risk Assessment by assisting in the identification of any risks and vulnerabilities inherent to operations of the proposed system. This assessment shall be in accordance with NIST Special Publication 800-30;
- Prepare a Security Plan that mitigates the identified risks. Security plans shall comply with HRSA standards and guidance as defined in NIST Special Publication 800-18
- Participate in the development of a plan of action and milestone (POA&M) schedule that assesses, prioritizes, and monitors the progress of corrective efforts for security weaknesses identified as a result of this modification to the system. Guidance for the POA&M process can be found in the US Department of Health and Human Services Plan of Action and Milestone Guide, which will be provided by HRSA OIT.
- Provide input, as required, to the Certification and Accreditation.
- Ensure all software and hardware proposed and implemented to meet this requirement comply with HRSA IT infrastructure and security standards and guidelines;
- Ensure that key staff that handle sensitive HRSA data have appropriate security clearances and authorizations to carry out the tasks needed to meet these requirements.

Task 7: REPORTING REQUIRMENTS

3.0.21 Contractor shall submit a monthly report, exclusively by email, which shall include, but not be limited to, significant accomplishments, significant problems encountered and corrective action taken, individual meeting costs, expenditures with a remaining total of contract fund availability, website hits and user activity and projected future contract activities, projected future costs, ad hoc status reports and recommendations.

3.22 Contractor shall submit a final cost report itemizing all expenditures and final costs at the conclusion of the contract.

3.0.20. . The following is a list of tentative meeting requirements including but not limited to the following:

SCHEDULE OF CONFERENCES: SEE ATTACHMENT G.

PERIOD OF PERFORMANCE: The period of performance shall be twelve(12) months from the effective date of contract (EDOC) award.

CONTRACT TYPE: The Government contemplates award of a Cost plus fixed fee type task order with certain ODC ceiling amounts in identified categories resulting from this solicitation. THE NIH/PICS USAGE FEE FOR THIS TASK ORDER WILL BE .5 %.

PAYMENT SCHEDULE – The contractor may invoice as frequently as monthly in accordance with the billing instructions (Attachment G.) Two(2) invoices shall be submitted to the Project Officer (to be determined) and two(2) copies shall be submitted to the Contracting Office.

HHSAR 352.270-5 KEY PERSONNEL (APR 1984)

The personnel specified in this contract are considered to be essential to the work being performed hereunder. Prior to diverting any of the specified individuals to other programs, the Contractor shall notify the Contracting Officer reasonably in advance and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the program. No diversion shall be made by the Contractor without the written consent of the Contracting Officer; provided, that the Contracting Officer may ratify in writing such diversion and such ratification shall constitute the consent of the Contracting Officer required by the clause. The contract may be amended from time to time during the course of the contract to either add or delete personnel, as appropriate. The Government reserves the right to approve any necessary successor to the Project Director.

The following staff are considered to be key personnel for work performed under this contract:

Project Director:

ATTACHMENT - B

ARTICLES OR SERVICES TO BE DELIVERED AND DELIVERY DATE

The Contractor shall submit one (1) copy of Task 7 Final Report to the

Contracting Officer,
HRSA, Parklawn Building, Room 13A-19,
5600 Fishers Lane, Rockville, Maryland 20857.

All remaining copies of the deliverables listed below shall be submitted to the Project Officer in the quantities stipulated on or before the specified delivery dates:

Project Officer : TBA,
Health Resources and Services Admin.
Parklawn Building, Room tba
5600 Fishers Lane
Rockville, Maryland 20857

Task 4	◆ Pre-meeting with PO	4 weeks before each meeting
DELIVERABLES LIST ITEM	DESCRIPTION	DATE
Task 1	◆ Mailing List Maintenance ◆ PO and DOT Team Meeting	ongoing 7 days of EDOC
	◆ Duplication of Meeting Revised Work Materials	7 days after PO meeting 30 days before each meeting
Task 2	◆ Distribution of Meeting Materials ◆ Planning Meeting and Report	30 days before each meeting 3 weeks before each meeting
Task 3	◆ Provision of Meeting Supplies	7 days before each meeting
	◆ Travel Arrangements Sponsored Speakers	60 days before each meeting within 30 days of speaker's paperwork submission
	◆ On-line Registration arrangement	45 days before each meeting
	◆ Contact Participants	45 days before each meeting
Task 4	◆ Pre-meeting with PO	4 weeks before each meeting
	◆ Database Maintenance	ongoing
	◆ Mailing List Maintenance	ongoing
	◆ Duplication of Meeting Materials	30 days before each meeting
	◆ Distribution of Meeting Materials	30 days before each meeting
	◆ Provision of Meeting Supplies	7 days before each meeting
	◆ Reimbursement of Sponsored Speakers	within 30 days of speaker's paperwork submission

Task 6 DELIVERABLES LIST ITEM	DESCRIPTION	DATE
	◆ Coordinate A/V Assistance and Video Production	Within 14 days of EDOC
Task 5	<ul style="list-style-type: none"> ◆ 1. pre-production of 3-5 video for each Speaker's Travel Learning Session ◆ 2. Speaker DVD production Reimbursement of Spread Leaders Conference 	<p>Within 30 days of each Learning Session</p> <p>Within 30 days of receipt of travel work</p> <p>Within 30 days after Spread Leader Conference</p>
	<ul style="list-style-type: none"> 3. DVD production of each Learning Session ◆ Coordinate A/V Video Satellite Teleconference 1. Satellite Video Conference Report ◆ Coordinate Conference Call ◆ Coordinate Database Management 1. Provide Monthly Status Reports 	<p>Within 30 after each Learning Session</p> <p>Within 14 days of EDOC</p> <p>Within 14 days after each Learning Session</p> <p>Within 14 days of EDOC</p> <p>Within 14 days of EDOC</p> <p>By the 5th day of the month</p>
Task 7	<ul style="list-style-type: none"> ◆ Submit Monthly Reports ◆ Submit Final Report 	<p>By the 5th day of each month</p> <p>At the conclusion of the contract</p>

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ATTACHMENT - C

RFTO/TECHNICAL PROPOSAL INSTRUCTIONS AND EVALUATION CRITERIA

To facilitate the evaluation of the proposal, the offeror shall submit its materials in two separately bound physical entities: (1) the business proposal, and (2) the technical proposal. The technical proposal shall provide unpriced detail of labor hours and other related costs but shall not contain prices.

It is recommended that the offerors technical proposal shall have a maximum page length (excluding resumes and other appendices) not to exceed 30 pages single spaced. Font size shall be no smaller than 12 pitch. The technical evaluation criteria and associated proposal instructions are presented below.

Proposals which merely offer to conduct a program in accordance with the requirements of the Government's Scope of Work will be considered nonresponsive to this request and will not be eligible for award.

The technical proposal content shall include, but need not be limited to, the following:

A. Management and Staffing Plan

- 1) The offeror shall submit a project work plan and time schedule including all work to be performed and deliverables.
- 2) The proposal shall fully describe the proposed approach to meet each of the requirements specified under the Description and Scope of Work, including all respective tasks, and the Schedule of Deliverables.
- 3) A discussion of anticipated major problem areas, together with potential approaches to their solution.

B. Personnel

The proposal shall specify the types of personnel (in terms of education and professional experience) to be employed to perform the tasks and subtasks. Resumes of those personnel who will be working directly on this contract shall be included. The proposal also shall provide documentation of the qualifications of any contractors, contract staff, and consultants working on this contract as well as evidence of commitment to participate.

1. The identification of the person who shall serve as Project Director.
2. The identification of other key personnel/ involved in the management of the project.

C. Organizational Experience and Past Performance

The proposal shall include a description of the capability and the experience of the offeror relative to the requirements of the project. This shall include a description of prior and/or current projects that are similar and demonstrated experience with high profile Federal meeting

planning. This shall also include a description of previous experiences related to this subject matter. The proposal shall include a list of references that the offeror has previously worked with and that may be contacted.

D. Coordination of Varied Technical Services

The proposal shall specify the offerors approach to coordinate the varied technical efforts and quality performance for multiple technical services.

E. Review and Technical Evaluation Criteria

The proposal will be evaluated using the following criteria and weights as they related to the content of the corresponding paragraphs of the TECHNICAL PROPOSAL INSTRUCTIONS. OFFERORS PLEASE NOTE: The below Evaluation Criteria, for a total of 100 points, will be used by technical review committee to determine technical acceptability or unacceptability of the proposal and to rate the technical proposals. The proposal will be evaluated utilizing the following criteria and weights as they relate to the lettered paragraphs in the Technical Proposal Instructions:

<u>Evaluation Criteria</u>	<u>Assigned Weights</u>
A. Management and Staffing Plan	35
B. Personnel	15
C. Organizational Experience & Past Performance	40
D. Varied Technical Services Coordination	10
TOTAL	100

The technical proposal will receive paramount consideration in the selection of the Contractor(s) for this acquisition, although cost and past performance will also be considered. In the event the technical evaluation reveals that two or more offers are approximately equal in technical ability, then the estimated cost and of past performance of an Offeror will become significantly more important. In any event, the Government reserves the right to make an award to the best advantage of the Government, technical, cost, and other factors considered.

The Government reserves the right to make a single award, multiple awards, or no award as a result of this RFTO. In addition, the RFTO may be amended if determined to be in the best interest of the Government.

The Government reserves the right to make an award without discussion of the proposals received. Therefore, it is important that your proposal be submitted initially on the most favorable terms from both the technical and cost standpoints. Also, the Government may award this contract to the responsible offeror whose proposal, conforming to the solicitation, will be most advantageous to the Government, with paramount consideration

being given to the evaluation of the technical proposal rather than cost or price.

ATTACHMENT - D

RFTO/GENERAL PROPOSAL INSTRUCTIONS

A. General Instructions

1. The proposal must be prepared in two parts: a "Technical Proposal" and a "Business Proposal/Request for Quotation." Each of the parts shall be separate and complete in itself so that evaluation of one may be accomplished independently of evaluation of the other. The technical proposal must not contain reference to cost; however, resource information, such as data concerning labor hours and categories, materials, etc., must be contained in the technical proposal so that your understanding of the scope of the work may be evaluated. It must disclose your technical approach in sufficient detail to provide a clear and concise presentation that includes, but is not limited to, the requirements of the technical proposal instructions.
2. The proposal must be signed by an official who is authorized to commit your organization. Five (5) copies of your technical proposal and five (5) copies of your business proposal must be submitted to:

DHHS, Health Resources and Services Administration
ATTN: HRSA-04-N234-5023ms
5600 Fishers Lane, Room 13A-19
Rockville, Maryland 20857

B. ADDITIONAL GUIDANCE

1. The technical proposal should reflect a clear understanding of the nature of the work being undertaken.
2. The technical proposal must provide the general background, experience, and qualifications of the organization.
3. The technical proposal must contain a discussion of present or proposed facilities and equipment, which will be used in the performance of the task order/contract.

Specifically, the data and information in the technical proposal should be organized according to *Attachment C –RFTO/Technical Proposal Instructions and Evaluation Criteria*.

C. Business Proposal Instructions

1. Request for Quotation Instructions

A request for business proposal shall be prepared with supporting attachments that satisfy

the instructions and appropriate format in accordance with the offeror's current NIH/NPICS contract. The offeror must submit a copy of the NIH/NPICS contract. The offeror must satisfy the instructions and appropriate format of the following :

- a. The cost for individual elements, such as analytical studies, reports, etc., shall be itemized. The Offeror shall provide the following detail as part of the cost proposal in addition to any other requirements for cost detail required by this RFTO.

For proposal estimating purposes only a Sample Cost Element Summary has been provided. Please see Attachment F. Pertaining to the Labor Categories - These are Government proposed labor categories to be used for estimation purposes. The contractor may propose equivalent labor categories, however, the equivalency must be clear. Pertaining to the ODC categories Audio-Visual Conference Support, Conference Call Communications and Knowledge Sharing – The ceiling rate is provided for proposal purposes. The offeror's cost for these three categories shall not exceed the identified amounts.

The above may also be used as a suggested format for illustrating labor costs.

(2) If the organization does not have an established indirect cost rate, supporting information for any quoted rate should be submitted. Indirect costs rates proposed for on site (work performed at Government provided location) and off site (work provided at Contractor's establishment) should be indicated clearly and applied to the budget calculation.

(3) Where travel is proposed/applies, the contemplated itineraries, method of travel, and period of travel should be shown. The Offeror shall indicate whether the estimated costs include such offsets as cash discounts, trade discounts, rebates, or allowances, etc. As applicable, the Contractor shall identify any pre-existing relationship with a travel agency used to provide the estimates.

(4) The basis for estimates for material, supplies, equipment, and other direct costs etc., should be explained.

(5) It is HHS policy that Contractors provide all equipment and facilities necessary for performance of contracts; however, in some instances, an exception may be granted to furnish Government-owned property or to authorize purchase with contract funds. If additional equipment must be acquired, you must include in your proposal the description and estimated cost of each item, and whether you propose to furnish the item with your own funds. Further, you must identify all Government owned property in your possession and all property acquired from Federal funds, to which you have title that is proposed to be used in the performance of the prospective contract. The management and control of Government property must be

in accordance with HHS Publication (OS) 74-115 entitled, "Control of Property in Possession of Contractors," a copy of which will be provided upon request.

2. In addition, the offeror shall include the following:
 - a. Certified, unloaded, labor rates for individuals expected to work this project.
 - b. Certified documentation indicating that the offeror has a cost accounting system in place which allows for the collection, tracking and reporting of all costs.
 - c. Certified documentation that the offeror has a current indirect cost rate agreement in place with a federal agency or that is in the process of obtaining or revising such an agreement. A copy of the cost rate agreement or the proposed rate agreement shall be provided.
3. Please provide a detailed budget justification/narrative, which clearly indicates how each cost is calculated, and a detailed line item budget. If items are lumped together in the line item budget, provide the breakdown within the budget justification/narrative. (Cost proposals that fail to include the required information may be disqualified due to unresponsiveness).

D. Past Performance Analysis

Offerors shall mail the Past Performance Questionnaire and Letter to previous clients (**see below Attachment E**) that are representative of the Offeror's capability to perform the services described in this solicitation. **It is the Offeror's responsibility to ensure at least three (3) clients forward this information to the Government.** In addition, Offeror's shall submit the following information in their proposal :

A maximum of three (3) relevant contracts recently expired during the past three (3) years and a maximum of three (3) ongoing contracts that are similar in nature to this scope of work. Contracts listed may include those entered into with the Federal Government, state and local Governments and commercial customers. Include the following information for each contract:

1. Name, address, **FAX** and **current** telephone number of each contracting organization/customer and name and FAX and telephone number of the Project Officer and Contracting Officer; Contract numbers, types and total contract \$ values;
2. Periods of performance (including original completion date and actual completion date with an explanation for any variance);
3. Discussion of the similarities and differences between this proposed effort and the specifications of those contracts;
4. Brief description of the expectations and scopes of each of the other contracts;

Offerors shall also discuss any experiences with termination actions over the past three (3) years. Identify and explain any contract termination for default or for the convenience by the Government and reason(s) why such actions were taken.

Each Offeror will be evaluated on their performance under current and prior contracts for similar services. Performance information will be used for both responsibility determinations and as an evaluation factor against which the Offeror's relative ranking (as indicated by the past performance information) will be compared to assure the best value to the Government. The Government will focus on information that demonstrates quality of performance relative to the size and complexity of the acquisition under consideration.

ATTACHMENT E

PAST PERFORMANCE INFORMATION SURVEY QUESTIONNAIRE

Request for Proposal Number: **HRSA-04-N234-5023mc**

THE NAME OF ORGANIZATION FOR WHICH THIS SURVEY SCORES :

PLEASE RETURN COMPLETED SURVEY ASAP TO:

ATTN: Mario Checchia
Health Resources and Services Administration
ROOM 13A19, 5600 FISHERS LANE
ROCKVILLE, MARYLAND 20857
PHONE: 301-443-3098, FAX: 301-443-6038

PLEASE FILL IN THE FOLLOWING:

YOUR NAME: _____ YOUR
AGENCY: _____
ADDRESS: _____
PHONE NUMBER: _____ FAX : _____
SIGNATURE OF PERSON COMPLETING SURVEY: _____
CONTRACT NUMBER/SOLICITATION NUMBER: _____

YOUR ROLE IN THIS CONTRACT - CIRCLE ONE
PROJECT OFFICER CONTRACTING OFFICER CONTRACT SPECIALIST

CONTRACT VALUE (INCLUDING OPTIONS): \$ _____
PERIOD OF PERFORMANCE (INCLUDING OPTIONS): _____
TYPE CONTRACT (I.E. COST REIMBURSEMENT, FIXED PRICE, ETC.): _____
APPROXIMATE PERCENTAGE OF WORK COMPLETED BY SUBCONTRACTORS: ____ %
GENERAL DESCRIPTION OR TITLE OF CONTRACT: _____

RATINGS Please answer each of the following questions with a rating that is based on objective measurable performance indicators to the maximum extent possible. Comments to support rating may be noted on last page. **NUMERICAL RATINGS ARE DEFINED AS FOLLOWS:**

- +2 EXCELLENT** - Based on the Offeror=s performance record, no doubt exists that the Offeror will successfully perform the required effort. A significant majority of sources of information are consistently firm instating that the Offeror=s performance was superior and that they would unhesitatingly do business with the Offeror again.
- +1 GOOD** - Based on the Offeror=s performance record, little doubt exists that the Offeror will successfully perform the required effort. Most sources of information state that the Offeror=s performance was good, better that average, etc., that they would do business with the Offeror again.
- 0 None** - No past performance history identifiable.
- 1 MARGINAL** - Based on the Offeror=s performance record, some doubt exists that the Offeror will successfully perform the required effort. Many sources of information make unfavorable reports about the Offeror=s performance and express concern about doing business with the Offeror again.
- 2 POOR** -Based on the offeror=s performance record, serious doubt exists that the Offeror will successfully perform the required effort. A significant majority of sources of information consistently stated that the Offeror=s performance was entirely unsatisfactory and that they would not do business with the Offeror again.

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PLEASE CIRCLE THE NUMERICAL SCORE INDICATING YOUR RATING**QUALITY OF SERVICE**

1.	Compliance with contract requirements	+2	+1	0	-1	-2
2.	Accuracy of reports	+2	+1	0	-1	-2
3.	Effectiveness of personnel	+2	+1	0	-1	-2
4.	Technical excellence	+2	+1	0	-1	-2

COST CONTROL

1.	Record of forecasting and controlling target costs	+2	+1	0	-1	-2
2.	Current. Accurate and complete billings	+2	+1	0	-1	-2
3.	Relationship of negotiated costs to actuals	+2	+1	0	-1	-2
4.	Cost efficiencies	+2	+1	0	-1	-2

TIMELINESS OF PERFORMANCE

1.	Met interim milestones	+2	+1	0	-1	-2
2.	Reliability	+2	+1	0	-1	-2
3.	Responsive to technical direction	+2	+1	0	-1	-2
4.	Completed on time including wrap up and contract administration	+2	+1	0	-1	-2
5.	Met delivery schedules	+2	+1	0	-1	-2
6.	Liquidated damage assessed: yes/no	+2	+1	0	-1	-2

BUSINESS RELATIONS

1.	Effective management, including subcontracts	+2	+1	0	-1	-2
2.	Reasonable/cooperative behavior	+2	+1	0	-1	-2
3.	Responsive to contract requirements	+2	+1	0	-1	-2
4.	Notification of problems	+2	+1	0	-1	-2
5.	Flexibility	+2	+1	0	-1	-2
6.	Pro-active vs. Reactive	+2	+1	0	-1	-2
7.	Effective small/small disadvantaged business subcontracting program	+2	+1	0	-1	-2

CUSTOMER SATISFACTION

1.	The contractor is committed to customer satisfaction	+2	+1	0	-1	-2
2.	Would you recommend selection of this firm again?	+2	+1	0	-1	-2

GENERAL OVERALL RATING OF CONTRACTOR +2 +1 0 -1 -2

ADDITIONAL COMMENTS:



DEPARTMENT OF HEALTH AND HUMAN SERVICES
Health Resources and Services Administration

Date:

Dear Client:

We are currently responding to the Health Resources and Services Administration solicitation no. HRSA_RFP no. **“ Conference and Communications Support for the Yeild Strategy, Spread Strategy, and 2nd Collaborative of the Organ Donation Breakthrough Collaborative , entitled “”** The Government is placing increased emphasis in its acquisition on past performance as a source selection factor. The purpose of this letter is to request that clients of firms responding to HRSA solicitations be identified and asked to submit evaluation of client’s current or past performance.

We have enclosed a past performance questionnaire for your completion Please complete this questionnaire and forward it directly to HRSA at the following address:

ATTN: Mario Checchia/04-N234-5023mc
CONTRACT OPERATIONS BRANCH, HRSA
PARKLAWN BLDG., ROOM 13A19
5600 FISHERS LANE, ROCKVILLE, MARYLAND 20857
PHONE: 301-443-2583, FAX: 301-443-6038

Since this information will be used as one of the evaluation factors for contract award, we are request that you complete this questionnaire and return it to the HRSA at the above address no later than **the date proposals that are due.**

We thank you for your prompt response in this matter.

Sincerely,

(To be signed by Offeror)

ATTACHMENT F

Sample Cost Element Summary Sheet for Proposal Use Only				Attachment F
				Units/
Direct Labor/Estimated	Rate	Hours	Cost	Comments
Class I Project Director	\$ -	2080	\$ -	
Conference Mgr.	\$ -	2080	\$ -	
Meeting Coordinator	\$ -	2080	\$ -	
Logistics Specialists 2	\$ -	4160	\$ -	
Database Administrator	\$ -	100	\$ -	
Editors –Webs	\$ -	100	\$ -	
Graphic Artists	\$ -	1040	\$ -	
Administrative Specialists 3	\$ -	6240	\$ -	
Other Administrative Staff	\$ -	8320	\$ -	
Other Administrative Staff	\$ -	1580	\$ -	
Total Direct Labor			\$ -	
Fringe Benefits	\$ -		\$ -	
Total Labor and Fringe			\$ -	
Overhead	\$ -		\$ -	
Total, Including Overhead			\$ -	
Other Direct Costs				
Audio-Visual Conf Support**			\$ not to exceed \$600,000. -	
	\$ -		\$ not to exceed \$125,000. -	
Conference Call Communications**			\$ not to exceed \$300,000. -	
	\$ -			
Knowledge Sharing**				
Travel	\$ -	650	\$ -	
Per Diem	\$ -	1900	\$ -	
Hotel	\$ -	1625	\$ -	
Honoraria	\$ -	654	\$ -	
Hotel Conference Room Rent	\$ -	134	\$ -	
RegistrationConferenceExp	\$ -	13400	\$ -	
Meeting Materials	\$ -	6000	\$ -	
Facsimile Transmissions	\$ -	3000	\$ -	
FedEx Services	\$ -	100	\$ -	
Direct Reproduction				
Reproduction	\$ -	1500	\$ -	
Total, Other Direct Costs			\$ -	

Total, Labor, Fringe, Overhead, ODCs			\$ -	
G&A	\$ -		\$ -	
FEE			\$ -	
Total, including G&A & FEE			\$ -	

****These are ceiling rates established specifically for these three categories. These rates may not be exceeded for this requirement.**

Attachment G

Proposed Date(s) September 12 - 14, 2004	Learning Session 1 Meeting Type	Number of Attendees	Two (2) Major Meeting Room; 12 Breakout Rooms; Meeting Materials*; All Non-Federal
3 Day Meeting 3 Day meeting Day 1 w/original August, 2005 Collaborative Group Day 2 with original and new members Location – central (e.g. Chicago, IL Day 3 New members only Location – West –e.g. San Diego, CA August, 2005	Spread Leaders National Training and Support Event	100 – 200 1400 10 speakers 900 10 speakers	Travel Arrangements. Travel and Meeting Room; breakout rooms and honorarium for all speakers. Meeting Materials*. All Non-Federal Travel Arrangements; and Faculty members plus 5 travel only. The Contractor may be required to establish contracts for special speakers to attend this meeting. Video Production; Video Uplink, and Provisions for Continental Breakfast, Lunch, and Breaks. Provisions for Continental Breakfast, Lunch, and Breaks.
3 Day Meeting Location – central (e.g. Chicago, IL Ft. Worth, TX)	Faculty Meeting	30	Meeting Room; Meeting Materials*, All Non-Federal Travel Arrangements; and all travel plus \$500/day honorarium. The Contractor may be required to establish contracts for special speakers to attend this meeting. Provisions for Continental Breakfast, Lunch, and Breaks.
August, 2005 1 Day Meeting Location – central (e.g. Chicago, IL Ft. Worth, TX)	Leadership Coordinating Council Meeting	45	Meeting Room; Meeting Materials*, All Non-Federal Travel Arrangements; and all travel for attendees. Provisions for Lunch, Dinner and Breaks.

<p>November, 2004 2 Day meeting</p> <p>Location – West – e.g. Phoenix, AZ</p>	<p>Spread Leaders Follow Up Training and Support Event</p>	<p>100 – 200</p> <p>10 speakers</p>	<p>Meeting Room; breakout rooms Meeting Materials*, All Non-Federal Travel Arrangements; and Travel and \$500/day honorarium for all speakers. The Contractor may be required to establish contracts for special speakers to attend this meeting. Provisions for Continental Breakfast, Lunch, and Breaks.</p>
<p>December, 2004 2 Day Meeting</p> <p>Location – DC metro area</p>	<p>Faculty Meeting in Preparation of LS2</p>	<p>30</p>	<p>Meeting Room; Meeting Materials*, All Non-Federal Travel Arrangements; and all travel plus \$500/day honorarium. The Contractor may be required to establish contracts for special speakers to attend this meeting. Provisions for Continental Breakfast, Lunch, Dinner and Breaks.</p>
<p>December, 2004 1 Day Meeting</p> <p>Location – Central e.g. Chicago, IL</p>	<p>Leadership Coordinating Council Meeting in Preparation of LS2</p>	<p>45</p>	<p>Meeting Room; Meeting Materials*, All Non-Federal Travel Arrangements; and all travel for attendees. The Contractor may be required to establish contracts for special speakers to attend this meeting. Provisions for Dinner, and Breaks.</p>
<p>January, 2005 3 Day Meeting for Faculty 2 Day Meeting for all others</p> <p>Location – West e.g. San Diego, Las Vegas</p>	<p>Learning Session 2</p>	<p>30</p> <p>900</p> <p>10 speakers</p>	<p>2 Major Meeting Room; 12 Breakout Rooms; Meeting Materials*; All Non-Federal Travel Arrangements; Travel and \$500/day honorarium for 30 Faculty members plus 5 travel only. Travel and \$500/day honorarium for all speakers. The Contractor may be required to establish contracts for special speakers to attend this meeting; Video Production; Video Uplink; and Provisions for Continental Breakfast, Lunch, and Breaks.</p>

<p>April, 2005</p> <p>2 Day Meeting</p> <p>Location – West e.g. Ft. Worth, TX</p>	<p>Faculty Meeting in Preparation of LS3</p>	<p>30</p>	<p>Meeting Room; Meeting Materials*, All Non-Federal Travel Arrangements; and all travel plus \$500/day honorarium. The Contractor may be required to establish contracts for special speakers to attend this meeting. Provisions for Continental Breakfast, Lunch, and Breaks.</p>	
<p>April, 2005</p> <p>1 Day Meeting</p> <p>Location – Chicago, IL</p>	<p>Leadership Coordinating Council Meeting in Preparation of LS3</p>	<p>45</p>	<p>Meeting Room; Meeting Materials*, All Non-Federal Travel Arrangements; and all travel for attendees. The Contractor may be required to establish contracts for special speakers to attend this meeting. Provisions Dinner and Breaks.</p>	
<p>May, 2005</p> <p>3 Day Meeting for Faculty</p> <p>2 Day Meeting for all others</p> <p>Location – East e.g. metro DC area, Richmond, VA</p>	<p>Learning Session 3</p>	<p>30</p> <p>2000</p> <p>10 speakers</p>	<p>2 Major Meeting Room; 12 Breakout Rooms; Meeting Materials*; All Non-Federal Travel Arrangements; and all travel plus \$500/day honorarium. For Faculty and Speakers plus 5 additional travel. The Contractor may be required to establish contracts for special speakers to attend this meeting; Video Production; Video Uplink; and Provisions for Continental Breakfast, Lunch, and Breaks.</p>	
<p>October, 2005</p> <p>1 day meeting</p> <p>Location – DC metro</p>	<p>Organ Donation Recognition Event</p>	<p>100-200</p> <p>2 speakers</p>	<p>Meeting materials, certificates. Provisions include 1 break/reception</p>	
<p>June, 2005</p> <p>1 Day Meeting</p> <p>Location – Century Plaza hotel Los</p>	<p>Faculty Debriefing Concluding 2nd Collaborative</p>	<p>30</p>	<p>Meeting Room; Meeting Materials*, All Non-Federal Travel Arrangements; and all travel plus \$500/day honorarium for Faculty,</p>	

Yield meetings September – November 2004	6 – 2 day Site visits in Locations to be determined	6 travelers per meeting	Includes travel of 6 people and meeting support for up to 20 at OPO sites. Provisions for lunch and breaks.
Technology Summit San Francisco, CA 2004	2 day meeting	200 attendees 5 speakers	Includes travel for 5 speakers . Provisions for breakfast, lunch and breaks. 2 large rooms, 6 breakout rooms, enhanced T1 Lines and Technology AV package.

* **MEETING MATERIALS are - Pre-Meeting Materials which include but are not limited to: Flip Charts; Binders; Tabs; Name Tags; Table Tents; Note Pads; and Pens. Other Meeting Materials include but are not limited to LCD Projector; DVD and/or VHS capabilities; any and all other A/V equipment as required; and A/V technical assistance.**