

**PART I - THE SCHEDULE
SECTION A - SOLICITATION FORM**

Request for Proposal No. AHRQ-09-10008

Date Issued: **December 15, 2008**
Date Questions Due: **January 7, 2009 12:00 PM ET**
Date Notice of Intent Due: **January 13, 2009**
Date Proposals Due: **February 17, 2009 12:00 PM ET**

You are invited to submit a proposal to the Agency for Healthcare Research and Quality (AHRQ) for Request for Proposal (RFP) No. AHRQ-09-10008, entitled "Evidence-based Technical Assistance for Multi-stakeholder, Community-based Quality Collaboratives". Your proposal must be developed and submitted in accordance with the requirements and instructions of this RFP.

The Government anticipates awarding one (1) contract from this one solicitation. A cost reimbursement performance-based contract is contemplated for a period of one year with 4 one-year option periods. Please see Section L.10 Technical Proposal Instructions for further information. The North American Industry Classification System (NAICS) code that best describes the requirement is 541611.

Offerors shall submit the following:

- A. Technical Proposal (See Section L.10) (Original, 9 copies, 1 electronic copy)
- B. Past Performance Information (See Section L.11) (Original and 3 copies)
- C. Small Disadvantaged Business Participation Plan (See Section L.12) (Original and 2 copies)
- D. Business Proposal (See Section L.13) (Original and 3 copies, 1 electronic copy)

Your **technical proposal** must be concisely written and should be **limited to 100 typewritten pages** (double-spaced, single sided), exclusive of personnel qualifications (i.e., resume, etc., see Section L.10 for additional details). Your **appendices are limited to 100 pages** (single sided) including all resumes, bibliographies, exhibits and attachments. This limitation is for administrative purposes only and exceeding the limitation shall not, of itself, be considered a basis for rejection of your proposal.

For this particular acquisition, the 2009 AHRQ recommended goal (as a percentage of total contract value for the base period) is 19% for Small Businesses, which shall include at least 5.5% (as a percentage of total planned subcontract dollars for the base period) for Small Disadvantaged Businesses, at least 5% (as a percentage of total planned subcontract dollars for the base period) for Women-Owned Small Businesses, and at least 3% (as a percentage of total planned subcontract dollars for the base period) for HUBZone Small Businesses and at least 3% (as a percentage of total planned subcontract dollars for the base period) for Service Disabled Veteran-Owned Small Businesses. These goals represent AHRQ's expectations of the minimum level for subcontracting with small business at the prime contract level. Any goal stated less than the AHRQ recommended goal shall be justified and is subject to negotiation.

Your proposal must provide the full name of your company, the address, including county, Tax Identification Number (TIN), DUN and Bradstreet No., and if different, the address to which payment should be mailed.

YOUR ATTENTION IS CALLED TO THE LATE PROPOSAL PROVISIONS PROVIDED IN SECTION L.3 OF THIS RFP. YOUR ATTENTION IS ALSO DIRECTED TO THE TECHNICAL PROPOSAL INSTRUCTIONS PROVIDED IN SECTION L.10 OF THE SOLICITATION.

If you intend to submit a proposal in response to this solicitation, please inform the Contracting Officer of your intent by completing the Proposal Intent Response Form (attached) and submit the form no later than January 13, 2009. Please fax it to 301-427-1740, Attention: Jessica Alderton, Contracting Officer or email to jessica.alderton@ahrq.hhs.gov.

Questions regarding this solicitation shall be received in this office no later than January 7, 2009. (See Section L.7). All questions shall be submitted electronically by e-mail to Jessica Alderton, Contracting Officer at the following email address: jessica.alderton@ahrq.hhs.gov. The subject line should be marked "Proposal Questions RFP No. AHRQ-09-10008."

Answers to questions will be provided in the form of an Amendment to this solicitation and will be posted on AHRQ's web page: www.ahrq.gov under "Funding Opportunities," "Contracts" and the Federal Business Opportunities web page: www.fedbizopps.gov. It is your responsibility to monitor the web sites where the RFP will be posted to learn about any amendments to the solicitation.

Discussions with any other individual outside the Division of Contracts Management, may result in rejection of the potential offeror's proposal.

The proposal shall be signed by an authorized official to bind your organization and must be received in our Contracts Office no later than **12 noon, ET, on February 17, 2009**. Your proposal must be mailed to the following address:

Agency for Healthcare Research and Quality
Division of Contracts Management
540 Gaither Road
Rockville, Maryland 20850

Hand carried proposals may be dropped off at the above location. However, please allow ample time as proposals cannot be accepted until they have gone through security. We will not be held responsible for any delays that may be incurred getting your proposal through security. NOTE: The U.S. Postal Service's "Express Mail" does not deliver to our Rockville, Maryland address. Packages delivered via this service will be held at a local post office for pick-up. The Government will not be responsible for picking up any mail at a local post office. If a proposal is not received at the place, date, and time specified herein, it will be considered a "late proposal."

The RFP does not commit the Government to pay any cost for the preparation and submission of a proposal. 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 the proposed acquisition.

In accordance with Federal Acquisition Circular (FAC) 2001-16, all contractors must be registered in the central contractor registration (CCR) database in order to conduct business with the government [See Section I - FAR clause 52.204-7 Central Contractor Registration (OCT 2003), Alternate 1 (Oct 2003)]. As stated in paragraph (h) of this clause, additional information can be obtained at <http://www.ccr.gov> or by calling 1-888-227-2423.

TABLE OF CONTENTS

<u>PART I</u>		<u>Pages</u>
Section A	Solicitation	1-2
	Table of Contents	3
Section B	Supplies or Services & Prices/Costs	4-7
Section C	Description/Specification/Work Statement	8-17
Section D	Packaging and Marking	18
Section E	Inspection and Acceptance	18
Section F	Deliveries or Performance	19-27
Section G	Contract Administration Data	28-30
Section H	Special Contract Requirements	31-41
<u>PART II</u>		
Section I	Contract Clauses	42-46
<u>PART III</u>		
Section J	List of Attachments	47
<u>PART IV</u>		
Section K	Representations and Instructions	48-55
Section L	Instructions, Conditions & Notices to Offerors	56-77
Section M	Evaluation Factors for Award	78-81
<u>Attachments</u>		
1	Past Performance Questionnaire and Contractor Performance Form	82-87
2	Proposal Intent Response Sheet	88
3	Breakdown of Proposed Estimated Cost and Labor Hours	89-90
4	Performance Requirements Summary	91-97
5	Slidedeck of CVE Program	98-103
6	Slidedeck of CVE Learning Network	104-112
7	Compendium of TA Needs Identified by First 14 CVEs – Excel Spreadsheet	---
8	Sample Pages from Private Web Site	113-115
9	Agenda for September 2008 Meeting of CVEs	116-123
10	Examples of Past Webinar Agendas	124-125

SECTION B-SUPPLIES OR SERVICES AND PRICES/COSTS

B.1 BRIEF DESCRIPTION OF SUPPLIES OR SERVICES

“Evidence-based Technical Assistance for Multi-stakeholder, Community-based Quality Collaboratives”. See Section C for a complete description.

B.2 ESTIMATED COST

- a. The estimated cost (exclusive of fees) for performance of the work under this one year (1) year contract, including direct and indirect costs is \$ (TO BE NEGOTIATED)
- b. The fixed fee for this contract is \$ (TO BE NEGOTIATED). The fixed fee shall be paid in installments based on the percentage of completion of work, as determined by the Contracting Officer. Payment shall be subject to the withholding provisions of the Clause ALLOWABLE COST AND PAYMENT and FIXED FEE incorporated herein.
- c. The maximum amount of award fee that may be earned for this contract is \$ (TO BE NEGOTIATED). Award fee earned shall be based upon an evaluation and determination by the Government as to the Contractor’s level of performance in accordance with the following procedures:
 - (1) The Contractor’s performance shall be evaluated on a semi-annual basis, during the performance of the contract. The award periods and maximum amounts for each are listed in Section H, Special Contract Requirements, H.8 Performance Evaluation and Award Fee.
 - (2) The criteria set forth in the Performance Requirements Summary, Attachment 4, shall be used to evaluate the Contractor’s performance.
 - (3) The Contractor further agrees that the final determination as to the amount of Award Fee earned will be made by the Contracting Officer, taking into consideration an analysis and evaluation of the Contractor’s performance made by the Evaluation Group described in Section H.8, and shall not be subject to the terms of the “Disputes” clause of this contract. The Contractor shall be advised in writing of the decision setting forth reasons why the Award Fee was earned or why it was not earned, in order that the Contractor may improve its performance during the next six (6) month period, if the latter is applicable.
 - (4) Notwithstanding any other provisions of this contract, the fee for performing this contract shall not exceed the statutory limitations prescribed in the first sentence of Section 304(b) of the Federal Property and Administrative Services Act (41 USC 254(b)) for services other than research, development or experimental work.
 - (5) Authorization to claim and be reimbursed for award fee under this contract will be accomplished by a signed Contracting Officer’s Authorization (COA) letter, issued when the award fee is determined to be due. The COA letter shall set forth the amount of award fee to be paid and shall indicate the performance period evaluated. Upon receipt of the COA letter, the Contractor may submit a public voucher

for payment of the total award fee earned for the period evaluated. Payment of the award fee shall be subject to the withholding provision of the clause entitled "Fixed Fee."

- d. The Government's maximum obligation, represented by the sum of the estimated cost plus the fixed fee and award fee obtainable for the contract period is as follows: (TO BE NEGOTIATED)

Period of Performance	Estimated Cost	Fixed Fee	Maximum Award Fee	Total Estimated Cost Plus All Fees
Base Year 1 04/15/09 – 04/14/10				

- e. Total funds currently available for payment and allotted to this contract are \$(TO BE NEGOTIATED) of which \$ (TO BE NEGOTIATED) represents the estimated cost, and of which \$(TO BE NEGOTIATED) represents the fixed fee and \$(TO BE NEGOTIATED) represents the award fee pool.
- f. It is estimated that the amount currently allotted will cover performance of the contract through (TO BE NEGOTIATED) .
- g. The Contracting Officer may allot additional funds to the contract without the concurrence of the Contractor. For further provisions on funding, see the LIMITATION OF COST/LIMITATION OF FUNDS and the ALLOWABLE COST AND PAYMENT (AND FIXED FEE) clauses incorporated herein.
- h. COST AND PAYMENT (AND FIXED FEE) clauses incorporated into this contract.

B.3 OPTION PERIODS

In the event that the option period is exercised, the total estimated cost, fixed fee and award fee will be increased by the following amounts: (TO BE NEGOTIATED)

Period of Performance	Estimated Cost	Fixed Fee	Maximum Award Fee	Total Estimated Cost Plus All Fees
Option Year 1 04/15/10 – 04/14/11				
Option Year 2 04/15/11 – 04/14/12				

Option Year 3 04/15/12 – 04/14/13				
Option Year 4 04/15/12 – 04/14/13				

B.4 PROVISIONS APPLICABLE TO DIRECT COSTS

a. Items Unallowable Unless Otherwise Provided Notwithstanding the clauses, ALLOWABLE COST AND PAYMENT, and FIXED FEE, incorporated into this contract, unless authorized in writing by the Contracting Officer, the costs of the following items or activities shall be unallowable as direct costs:

- (1) Acquisition, by purchase or lease, of any interest in real property;
- (2) Rearrangement or alteration of facilities;
- (3) Purchase or lease of any item of general purpose-office furniture or office equipment regardless of dollar value. (General purpose equipment is defined as any items of personal property which are usable for purposes other than research, such as office equipment and furnishings, pocket calculators, etc.);
- (4) Accountable Government property (defined as both real and personal property with an acquisition cost of \$1,000 or more, with a life expectancy of more than two years) and "sensitive items" (defined and listed in the Contractor's Guide for Control of Government Property, 1990, regardless of acquisition value;
- (5) Travel to attend general scientific meetings;
- (6) Foreign Travel;
- (7) Any costs incurred prior to the contract's effective date;
- (8) Rental of meeting rooms not otherwise expressly paid for by the contract;
- (9) Any formal subcontract arrangements not otherwise expressly provided for in the contract
- (10) Consultant fees in excess of \$1000/day
- (11) Information Technology hardware or software; and

(12) Food and Beverages.

- b. This contract is subject to the provisions of Public Law (P.L.) 99-234 which amends the Office of Federal Procurement Policy Act to provide that contractor costs for travel, including lodging, other subsistence, and incidental expenses, shall be allowable only to the extent that they do not exceed the amount allowed for Federal employees. The Contractor, therefore, shall invoice and be reimbursed for all travel costs in accordance with Federal Acquisition Regulations (FAR) 31.205-46.

SECTION C - DESCRIPTION/ SPECIFICATION/ WORK STATEMENT

Independently and not as an agent of the Government, the Contractor shall furnish all the necessary services, qualified personnel, material, equipment, and facilities, not otherwise provided by the Government as needed to perform the Statement of Work below:

A. Background statement/project history

Support for local, multi-stakeholder quality collaboratives, referred to as Chartered Value Exchanges (CVEs), represents one of the Agency's efforts to systematically foster public-private efforts to use evidence-based strategies to improve health care quality and contain costs, one community at a time. Applications from twenty-four (24) local or regional collaboratives have been awarded CVE status, which entitles them to participate in AHRQ's CVE Learning Network, the vehicle for receiving technical assistance from experts and from each other, and the focus of this solicitation.

The 24 collaboratives, which may increase in number over time, are tasked with measuring and reporting on physician or hospital practice in a meaningful and transparent way to influence value-based decisionmaking by consumers and purchasers of health care. Some collaboratives have been in existence a number of years and are mature; other collaboratives were formed only in the last year. A fundamental principle of CVEs is active participation by representatives from four stakeholder groups -- providers, purchasers, health plans and consumer organizations -- in CVE activities and CVE decisionmaking.

The purpose of this solicitation is to provide technical assistance to the CVEs, which succeeds a previous contract that has been providing technical assistance to CVEs since March 2008.

Additional information about the local, multi-stakeholder quality collaboratives can be found in the following attachment: Attachment # 5: Slidedeck of CVE Program.

B. Objectives

The goal of this award is to implement an evidence-based technical assistance program for 24 (and possibly more) CVE teams, each of which includes representatives from four stakeholder groups: providers, purchasers, health plans and consumer organizations as well as other local stakeholders (such as state data organizations) as identified by the CVE leadership team.

The four primary venues for providing technical assistance are:

- Private Web site for CVEs
- Webinar series
- In-person conferences
- Workgroup on standard public report elements

Technical assistance priorities are 100% driven by needs of the collaboratives, identified informally and formally by discussions with the collaboratives, and prioritized in partnership with Agency staff. This contract will focus on demand-driven, practical, applied topics that are of direct, practical interest to collaborative teams. A wide range of technical and practical topics will be covered. Topics will include but are not limited to: 1) Collaborative Leadership and CVE

Sustainability; 2) Public at-large Engagement; 3) Data Aggregation and Quality and Efficiency Measurement; 4) Public Reporting on Quality and Efficiency; 5) Provider Incentives for Quality; 6) Consumer Incentives for Quality; 7) Cross-organizational Capacity for Improving Quality; and 8) Health Information Technology.

Additional information about the 24 local, multi-stakeholder quality collaboratives and the CVE Learning Network can be found in the following attachments:

- Attachment # 6: Slidedeck of CVE Learning Network
- Attachment # 7: Compendium of TA Needs Identified by First 14 CVEs
- Attachment # 8: Sample Pages from Private Web Site
- Attachment # 9: Agenda for September 2008 Meeting of CVEs
- Attachment # 10: Examples of Past Webinar Agendas

C. Specific Requirements

This is a 1-year contract (with four 1-year options). The contractor shall be located within 100 miles of AHRQ. The contractor shall have the Project Director on-site at AHRQ for at least 20 hours per week. AHRQ will provide office space and a telephone for the Project Director working on-site. The Project Director must possess graduate level training and have at least 10 year's experience managing projects similar in size and nature to the one listed below.

The contractor shall engage in a range of rapid cycle tasks and activities in delivering technical assistance, with the specific aim of assisting CVEs and their respective stakeholders (i.e., purchasers, providers, health plans and consumer organizations) make informed and evidence-based decisions related to their respective quality agendas. Tasks and activities will be geared for collaborative participants at both introductory and advanced levels, and will include but are not limited to: 1) Collaborative Leadership and CVE Sustainability; 2) Public at-large Engagement; 3) Data Aggregation and Quality and Efficiency Measurement; 4) Public Reporting on Quality and Efficiency; 5) Provider Incentives for Quality; 6) Consumer Incentives for Quality; 7) Cross-organizational Capacity for Improving Quality; and 8) Health Information Technology.

Web site, Webinar, conference and workgroup content will overlap significantly with existing AHRQ portfolios of work and will feature AHRQ experts and AHRQ products. Because of this significant overlap, along with a need for the Project Lead to be an integral part of routine meetings with Agency staff, including ongoing discussion with the Agency's knowledge transfer staff, and the dynamic, rapid cycle nature of the scope of work, the contractor must have its office (or a satellite office) within 100 miles of the Agency office. Further, Project Lead is to work out of the Agency office at least 20 hours per week.

The tasks to be completed by the contractor are outlined below:

Task 1: Undertake administrative and planning activities. The contractor team must be flexible and responsive to the Agency. They must have the capability to effectively troubleshoot and do advance planning (including contingency planning).

Subtask 1.1: Participate in planning/orientation meeting to discuss project goals, tasks, rough workplan, Agency-contractor coordination and transition of tasks, especially private Web site, from initial contractor. Meet with AHRQ staff within 1 week of award. At least 2 work days before planning/orientation meeting, contractor to prepare draft agenda for planning/orientation meeting.

Subtask 1.2: Within 1 week after planning/orientation meeting, the contractor to convene a planning call specifically to arrange transition, especially of private Web site. At least 2 work days before meeting, contractor to prepare draft agenda.

Subtask 1.3: Within 2 weeks after planning/orientation meeting, the contractor to submit a draft, workplan that spans four primary components (Web site, Webinars, in-person conferences, workgroup) and addresses the specific tasks outlined in the RFC. Within 3 weeks after planning/orientation meeting, the contractor to submit a final workplan. The contractor shall deliver to the PO an electronic project plan including deliverables, tasks and schedule and provide updates for the completion of Phase I, using Microsoft Office Project (version 2003). The electronic project plan should include a work breakdown structure (WBS) with a minimum of 3 levels of detail with unique numbering, deliverables, milestones, and Gantt chart. Also, the contractor shall deliver to the TOO and PO a hierarchical-type Project Organization Chart and a Responsibility Assignment Matrix (RAM).

Subtask 1.4: Project Director shall provide at least 3 briefings per year on CVE technical assistance program, as requested by Agency staff. Task to include travel, lodging and preparation of briefing materials.

Subtask 1.5: Submit monthly progress report for Agency to review hand-in-hand with monthly invoice. Report shall include activities performed, accomplishments, barriers, Web site activity, etc.

Subtask 1.6: Plan weekly, twice weekly or more frequent coordination calls with Agency. At least 2 work days before calls, contractor to prepare draft agendas. Initiate and respond to email communication with Agency staff. Actively troubleshoot to address issues that arise.

Task 2: Maintain and update private Web site for CVEs. Web site, designed to be transferable, currently includes 24 CVE profiles, roughly 450 individual CVE stakeholder registrants, calendar of upcoming TA activities, TA Webinar audio and slide archive, conference slide archive, library of resources, Chat Forum for peer-to-peer exchange. All postings on the Web site must be made 508-compliant by contractor.

Subtask 2.1: Post TA resources, including audios arranged by contractor of past Webinars, slidedecks from past Webinars, slidedecks from conference presentations, including 508-compliant versions.

Subtask 2.2: Maintain up-to-date calendar on the Web site, which includes upcoming Webinars, meetings, etc.

Subtask 2.3: Screen potential new resources related to CVE agendas, and post those that are relevant and evidence-based on Web site library.

Subtask 2.4: Track Web site activity by CVEs, such as monthly statistics by number of hits, unique visitors to the site, pages visited, etc.

See sample pages from existing CVE Web site in Attachment #8.

Task 3: Convene Webinar series. Webinar topics will be driven by needs of collaboratives and prioritized with Agency staff and will include but are not necessarily limited to the following areas: 1) Collaborative Leadership and CVE Sustainability; 2) Public at-large Engagement; 3) Data Aggregation and Quality and Efficiency Measurement; 4) Public Reporting on Quality and Efficiency; 5) Provider Incentives for Quality; 6) Consumer Incentives for Quality; 7) Cross-organizational Capacity for Improving Quality; and 8) Health Information Technology. Needs of CVEs have been identified via already completed needs assessments, as augmented by Webinar and meeting evaluations and informal conversations among CVE stakeholders, Agency staff and contractor. Webinar speakers may include experts familiar with the evidence base and collaboratives with peer-to-peer experiences to share, depending on the specific Webinar agenda. Webinars periodically will feature and focus on key updates from the Quality Alliance Steering Committee (QASC), e.g., two per year, and Agency Director, e.g., quarterly.

For each Webinar, assume roughly 100 CVE participants on each. For each Webinar, assume honoraria for 1 expert.

Subtask 3.1: In coordination with Agency staff, plan and implement 2-3 Webinars per month.

Subtask 3.2 Develop a marketing plan for upcoming Webinars, including but not limited to keeping an up-to-date calendar on the Web site.

Subtask 3.3: For each Webinar, in coordination with Agency staff, identify and suggest potential speakers, develop Webinar agenda (1-2 months in advance of Webinar), and draft summary of Webinar content can be used in marketing Webinar (2-3 months in advance of Webinar).

Subtask 3.4: Market the Webinar, and track Webinar registrants.

Subtask 3.5: Arrange audio recording of Webinar, review draft slides from speakers and make editorial suggestions.

Subtask 3.6: At least two days in advance of each Webinar, forward CVE registration list and draft AHRQ introductory talking points to AHRQ.

Subtask 3.7: Within 1 week of Webinar, create 508-compliant slides of webinar, and post with original slidedeck and audio recording on Web site.

Subtask 3.8: For each Webinar, host an online survey and analyze feedback.

Subtask 3.9: Track Webinar participation over time by CVEs, by stakeholder categories.

Subtask 3.10: Develop and maintain a 6-month workplan, to be revisited and updated quarterly in negotiation with Agency staff, for Webinar series. Include lessons learned from previous quarter activities.

Task 4: Convene two in-person meetings per year for roughly 175 persons each. Meeting will feature TA presentations by experts, peer-to-peer learning, and informal networking opportunities. Meeting also may feature updates from, e.g., Department, Agency and Quality Alignment Steering Committee (QASC) representatives.

Subtask 4.1: Develop agenda in collaboration with Agency, suggesting potential speakers, involving select CVE stakeholders in sessions, identifying networking opportunities.

Subtask 4.2: Work with speakers in refining the presentations to meet needs of CVEs, in critically reviewing slides.

Subtask 4.3: Identify potential hotels in DC metro area that meet needs (lodging and meeting room, including AV, unless Agency uses own facilities for meeting space), and select hotel in consultation with Agency. Enter into contract with hotel.

Subtask 4.4: Arrange and pay for food and refreshments for meeting participants, pending waiver or other arrangement.

Subtask 4.5: Arrange and reimburse for logistics and travel for up to 144 CVE stakeholders (up to 6 from each CVE), including letters of invitation and subsequent tracking of RSVPs -- plus roughly 20 guests, 10 of which are speakers/faculty. Pay honorarium for 10 faculty.

Subtask 4.6: Prepare meeting folders, which will include at least the following: agenda, participant lists (2 versions --sorted alphabetically by CVEs and sorted alphabetically by individuals), speaker bios, copy of presentation slidedecks, evaluation form.

Subtask 4.7: Prepare participant name tags, speaker tent cards.

Subtask 4.8: Create 508-compliant versions of speaker slidedecks and post along with original slidedecks on Web site.

Subtask 4.9: Analyze evaluation forms after the meeting.

Subtask 4.10: Develop and maintain a 6-month workplan, to be revisited and updated quarterly in negotiation with Agency staff, for meeting activities. Include lessons learned from previous quarter activities.

Task 5: Convene workgroup on standard public report elements. CVEs have indicated interest in exploring common, evidence-based (voluntary) report elements across CVE report cards, so that each individual CVE won't have to sort out and apply the evidence base, thereby conserving limited resources.

Assume roughly 10 CVE participants and 2 experts will participate in three in-person meetings and three conference calls.

Subtask 5.1: Draft an email to CVE stakeholders to: identify interest in being involved as a member of the Workgroup; periodically summarize Workgroup deliberations.

Subtask 5.2: Draft Workgroup highlights to document deliberations of Workgroup.

Subtask 5.3: Draft Workgroup working paper to summarize the aggregate deliberations of Workgroup (and explicitly flag next steps).

Subtask 5.4: Convene Webinar or conference call opportunities for Workgroup to vet deliberations with broader CVE community.

Subtask 5.5: Arrange for meeting facilitator.

Subtask 5.6: At least 2 weeks before each Workgroup meeting or call, draft agenda in collaboration with Agency, suggesting potential experts as warranted, involving select CVE stakeholders in sessions, identifying networking opportunities.

Subtask 5.7: Work with experts and facilitator in refining the presentations to meet needs of CVEs, in critically reviewing slides.

Subtask 5.8: Identify potential hotels in DC metro area that meet needs (lodging and meeting room, unless Agency uses own facilities for meeting space), and select hotel in consultation with Agency. Enter into contract with hotel.

Subtask 5.9: Arrange and pay logistics and travel for CVE and expert participants, including email notification and subsequent tracking of RSVPs. Pay honorarium for faculty.

Subtask 5.10: Arrange and pay for food and refreshments for meeting participants, pending waiver or other arrangement.

Subtask 5.11: Prepare meeting folders, which will include at least the following: agenda, copy of presentation slidedecks.

Subtask 5.12: Prepare participant tent cards.

Unpriced Agency options. In future the Contractor may be asked to develop a proposal for the following additional tasks. Provide a technical response to each of the unpriced Agency options (identified by task #). These will be evaluated in accordance with the Technical Evaluation Criteria. NOTE: A cost proposal is NOT required for the unpriced options.

Task 6: In the event new CVEs are added, vendor to complete related requisite tasks to include them in CVE Learning Network (eg, conduct welcome calls, draft Web site CVE profiles, conduct baseline interviews, etc)

Task 7: In addition to Task #5, Agency may opt to convene additional topic-specific, time-limited *workgroups* and/or *special workshops*. As an example of a *workgroup*, the Agency may, at the suggestion of CVEs, opt to convene a workgroup to identify and analyze use of cost/price/efficiency measures by CVEs, eg, in report cards, pay for performance and consumer incentives. As an example of a *workshop*, the Agency may opt to host a workshop just for provider participants of CVEs to identify and analyze strategies for involving the broader provider community in quality improvement, or a workshop just for consumer participants of CVEs on 'health care acronyms 101.'

Task 8: While most technical assistance is designed for all CVEs or a cluster of CVEs, occasions may arise for which the Agency opts to arrange and facilitate one-on-one consulting to address CVE TA need that is unique to one or more specific CVEs.

Task 9: Refine (and in some cases develop) a demand-driven, applied, evidence-based tool or product, such as a synthesis, case study or decision guide, evaluation, tailored for CVEs.

Option Years 1-4, Scope of Work

Specific Requirements

The contractor shall be located within 100 miles of AHRQ. The contractor shall have the Project Director on-site at AHRQ for at least 20 hours per week. AHRQ will provide office space and a telephone for the Project Director working on-site.

The contractor shall engage in a range of rapid cycle tasks and activities in delivering technical assistance, with the specific aim of assisting CVEs and their respective stakeholders (i.e., purchasers, providers, health plans and consumer organizations) make informed and evidence-based decisions related to their respective quality agendas. Tasks and activities will be geared for collaborative participants at both introductory and advanced levels, and will include but are not limited to: 1) Collaborative Leadership and CVE Sustainability; 2) Public at-large Engagement; 3) Data Aggregation and Quality and Efficiency Measurement; 4) Public Reporting on Quality and Efficiency; 5) Provider Incentives for Quality; 6) Consumer Incentives for Quality; 7) Cross-organizational Capacity for Improving Quality; and 8) Health Information Technology.

Web site, Webinar, conference and workgroup content will overlap significantly with existing AHRQ portfolios of work and will feature AHRQ experts and AHRQ products. Because of this significant overlap, along with a need for the Project Lead to be an integral part of routine meetings with Agency staff, including ongoing discussion with the Agency's knowledge transfer staff, and the dynamic, rapid cycle nature of the scope of work, the contractor must have its office (or a satellite office) within 100 miles of the Agency office. Further, Project Lead is to work out of the Agency office at least 20 hours per week.

The tasks to be completed by the contractor in the option years are outlined below:

Task 1: Undertake administrative and planning activities. The contractor team must be flexible and responsive to the Agency. They must have the capability to effectively troubleshoot and do advance planning (including contingency planning).

Subtask 1.1: Participate in planning/orientation meeting to discuss project goals, tasks, rough workplan, Agency-contractor coordination and transition of tasks, especially private Web site, from initial contractor. Meet with AHRQ staff within 1 week of award. At least 2 work days before planning/orientation meeting, contractor to prepare draft agenda for planning/orientation meeting.

Subtask 1.2: Within 1 week after planning/orientation meeting, the contractor to convene a planning call specifically to arrange transition, especially of private Web site. At least 2 work days before meeting, contractor to prepare draft agenda.

Subtask 1.3: Within 2 weeks after planning/orientation meeting, the contractor to submit a draft, workplan that spans four primary components (Web site, Webinars, in-person conferences, workgroup) and addresses the specific tasks outlined in the RFC. Within 3 weeks after planning/orientation meeting, the contractor to submit a final workplan. The contractor shall deliver to the PO an electronic project plan including deliverables, tasks and schedule and provide updates for the completion of Phase I, using Microsoft Office

Project (version 2003). The electronic project plan should include a work breakdown structure (WBS) with a minimum of 3 levels of detail with unique numbering, deliverables, milestones, and Gantt chart. Also, the contractor shall deliver to the TOO and PO a hierarchical-type Project Organization Chart and a Responsibility Assignment Matrix (RAM).

Subtask 1.4: Project Lead shall provide at least 3 briefings per year on CVE technical assistance program, as requested by Agency staff. Task to include travel, lodging and preparation of briefing materials.

Subtask 1.5: Submit monthly progress report for Agency to review hand-in-hand with monthly invoice. Report shall include activities performed, accomplishments, barriers, Web site activity, etc.

Subtask 1.6: Plan weekly, twice weekly or more frequent coordination calls with Agency. At least 2 work days before calls, contractor to prepare draft agendas. Initiate and respond to email communication with Agency staff. Actively troubleshoot to address issues that arise.

Task 2: Maintain and update private Web site for CVEs. Web site, designed to be transferable, currently includes 24 CVE profiles, roughly 450 individual CVE stakeholder registrants, calendar of upcoming TA activities, TA Webinar audio and slide archive, conference slide archive, library of resources, Chat Forum for peer-to-peer exchange. All postings on the Web site must be made 508-compliant by contractor.

Subtask 2.1: Post TA resources, including audios arranged by contractor of past Webinars, slidedecks from past Webinars, slidedecks from conference presentations, including 508-compliant versions.

Subtask 2.2: Maintain up-to-date calendar on the Web site, which includes upcoming Webinars, meetings, etc.

Subtask 2.3: Screen potential new resources related to CVE agendas, and post those that are relevant and evidence-based on Web site library.

Subtask 2.4: Track Web site activity by CVEs, such as monthly statistics by number of hits, unique visitors to the site, pages visited, etc.

See sample pages from existing CVE Web site in Attachment #8.

Task 3: Convene Webinar series. Webinar topics will be driven by needs of collaboratives and prioritized with Agency staff and will include but are not necessarily limited to the following areas: 1) Collaborative Leadership and CVE Sustainability; 2) Public at-large Engagement; 3) Data Aggregation and Quality and Efficiency Measurement; 4) Public Reporting on Quality and Efficiency; 5) Provider Incentives for Quality; 6) Consumer Incentives for Quality; 7) Cross-organizational Capacity for Improving Quality; and 8) Health Information Technology. Needs of CVEs have been identified via already completed needs assessments, as augmented by Webinar and meeting evaluations and informal conversations among CVE stakeholders, Agency staff and contractor. Webinar speakers may include experts familiar with the evidence base and collaboratives with peer-to-peer experiences to share, depending on the specific

Webinar agenda. Webinars periodically will feature and focus on key updates from the Quality Alliance Steering Committee (QASC), e.g., two per year, and Agency Director, e.g., quarterly.

For each Webinar, assume roughly 100 CVE participants on each. For each Webinar, assume honoraria for 1 expert.

Subtask 3.1: In coordination with Agency staff, plan and implement 2-3 Webinars per month.

Subtask 3.2 Develop a marketing plan for upcoming Webinars, including but not limited to keeping an up-to-date calendar on the Web site.

Subtask 3.3: For each Webinar, in coordination with Agency staff, identify and suggest potential speakers, develop Webinar agenda (1-2 months in advance of Webinar), and draft summary of Webinar content can be used in marketing Webinar (2-3 months in advance of Webinar).

Subtask 3.4: Market the Webinar, and track Webinar registrants.

Subtask 3.5: Arrange audio recording of Webinar, review draft slides from speakers and make editorial suggestions.

Subtask 3.6: At least two days in advance of each Webinar, forward CVE registration list and draft AHRQ introductory talking points to AHRQ.

Subtask 3.7: Within 1 week of Webinar, create 508-compliant slides of webinar, and post with original slidedeck and audio recording on Web site.

Subtask 3.8: For each Webinar, host an online survey and analyze feedback.

Subtask 3.9: Track Webinar participation over time by CVEs, by stakeholder categories.

Subtask 3.10: Develop and maintain a 6-month workplan, to be revisited and updated quarterly in negotiation with Agency staff, for Webinar series. Include lessons learned from previous quarter activities.

Task 4: Convene one in-person meeting for roughly 175 persons each. Meeting will feature TA presentations by experts, peer-to-peer learning, and informal networking opportunities. Meeting also may feature updates from, e.g., Department, Agency and Quality Alignment Steering Committee (QASC) representatives.

Subtask 4.1: Develop agenda in collaboration with Agency, suggesting potential speakers, involving select CVE stakeholders in sessions, identifying networking opportunities.

Subtask 4.2: Work with speakers in refining the presentations to meet needs of CVEs, in critically reviewing slides.

Subtask 4.3: Identify potential hotels in DC metro area that meet needs (lodging and meeting room, including AV, unless Agency uses own facilities for meeting space), and select hotel in consultation with Agency. Enter into contract with hotel.

Subtask 4.4: Arrange and pay for food and refreshments for meeting participants, pending waiver or other arrangement.

Subtask 4.5: Arrange and reimburse for logistics and travel for up to 144 CVE stakeholders (up to 6 from each CVE), including letters of invitation and subsequent tracking of RSVPs -- plus roughly 20 guests, 10 of which are speakers/faculty. Pay honorarium for 10 faculty.

Subtask 4.6: Prepare meeting folders, which will include at least the following: agenda, participant lists (2 versions –sorted alphabetically by CVEs and sorted alphabetically by individuals), speaker bios, copy of presentation slidedecks, evaluation form.

Subtask 4.7: Prepare participant name tags, speaker tent cards.

Subtask 4.8: Create 508-compliant versions of speaker slidedecks and post along with original slidedecks on Web site.

Subtask 4.9: Analyze evaluation forms after the meeting.

Subtask 4.10: Develop and maintain a 6-month workplan, to be revisited and updated quarterly in negotiation with Agency staff, for meeting activities. Include lessons learned from previous quarter activities.

Unpriced Agency options. In future the Contractor may be asked to develop a proposal for the following additional tasks. Provide a technical response to each of the unpriced Agency options (identified by task #). These will be evaluated in accordance with the Technical Evaluation Criteria. NOTE: A cost proposal is NOT required for the unpriced options.

Task 5: In the event new CVEs are added, vendor to complete related requisite tasks to include them in CVE Learning Network (eg, conduct welcome calls, draft Web site CVE profiles, conduct baseline interviews, etc)

Task 6: In addition to Task #5, Agency may opt to convene additional topic-specific, time-limited *workgroups* and/or special *workshops*. As an example of a *workgroup*, the Agency may, at the suggestion of CVEs, opt to convene a workgroup to identify and analyze use of cost/price/efficiency measures by CVEs, eg, in report cards, pay for performance and consumer incentives. As an example of a *workshop*, the Agency may opt to host a workshop just for provider participants of CVEs to identify and analyze strategies for involving the broader provider community in quality improvement, or a workshop just for consumer participants of CVEs on 'health care acronyms 101.'

Task 7: While most technical assistance is designed for all CVEs or a cluster of CVEs, occasions may arise for which the Agency opts to arrange and facilitate one-on-one consulting to address CVE TA need that is unique to one or more specific CVEs.

Task 8: Refine (and in some cases develop) a demand-driven, applied, evidence-based tool or product, such as a synthesis, case study or decision guide, evaluation, tailored for CVEs.

SECTION D - PACKAGING AND MARKING

Not Applicable

SECTION E - INSPECTION AND ACCEPTANCE

E.1 INSPECTION AND ACCEPTANCE

- a. The contracting officer or the duly authorized representative will perform inspection and acceptance of materials and services to be provided.
- b. For the purpose of this SECTION the Government Project Officer is the authorized technical representative of the contracting officer.
- c. Inspection and acceptance will be performed at:

Agency for Healthcare Research and Quality
540 Gaither Road
Rockville, Maryland 20850

E.2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This contract incorporates the following clause by reference, with the same force and effect as if it were given in full text. The full text of a clause may be accessed electronically at this address: <http://www.arnet.gov/far/>.

FAR Clause No.	Title and Date
52.246-5	Inspection of Services-Cost Reimbursement (April 1984)

SECTION F - PERIOD OF PERFORMANCE AND DELIVERY SCHEDULE

F.1 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This contract incorporates the following clause by reference, with the same force and effect as if they were given in full text. The full text of a clause may be accessed electronically at this address: <http://www.arnet.gov/far/>.

FEDERAL ACQUISITION REGULATION (FAR) (48 CFR CHAPTER 1) CLAUSES
FAR Clause No. Title and Date

52.242-15 Stop Work Order (AUG 1989)
 Alternate I (APRIL 1984)

F.2 PERIOD OF PERFORMANCE

The Government anticipates the period of performance shall begin on or about April 15, 2009 and run through April 14, 2010 with four one-year options from April 15, 2010 until April 14, 2014.

F.3 DELIVERY SCHEDULE

The Contracting Officer shall receive one copy of each progress report and final report/ final deliverable. In addition, one electronic and one hard copy of final reports and all other deliverables shall be submitted to the Project Officer.

Agency for Healthcare Research and Quality
 ATTN: Jessica Alderton, Contracting Officer
 Contracts Management / OPART
 540 Gaither Road
 Rockville, Maryland 20850
Jessica.Alderton@ahrq.hhs.gov

Agency for Healthcare Research and Quality
 ATTN: Peggy McNamara, Project Officer
 AHRQ/CDOM
 540 Gaither Road
 Rockville, Maryland 20850
 301-427-1440
Peggy.Mcnamara@ahrq.hhs.gov

The Contractor shall submit the following items (in electronic format) in accordance with the stated delivery schedule as noted below:

Task	Subtasks	Delivery
1. Administrative and planning	Subtask 1.1: Participate in planning/orientation meeting to discuss project goals, tasks, rough workplan, Agency-contractor coordination and transition of tasks, especially private Web site,	within 1 week after award; agenda 2 business days prior to meeting

	from initial contractor. Prepare draft agenda for planning/orientation meeting.	
	Subtask 1.2: Convene a planning call specifically to arrange transition, particularly of private Web site. Prepare draft agenda before call.	Within 1 week after planning/orientation meeting; agenda 2 business days prior to call
	Subtask 1.3: Submit a draft workplan that spans four primary components (Web site, Webinars, in-person conferences, workgroup) and addresses the specific tasks outlined in the RFC; submit final workplan.	Draft within 2 weeks after planning/orientation meeting; Final within 3 weeks after planning/orientation meeting.
	Subtask 1.4: Project Lead to give at least 3 briefings per year on CVE technical assistance program, as requested by Agency staff. Task to include travel, lodging and preparation of briefing materials.	April 10, 2009 through April 10, 2010
	Subtask 1.5*: Submit monthly progress report for Agency to review hand-in-hand with monthly invoice. Report shall include activities performed, accomplishments, barriers, Web site activity, etc.	5 th of each month
	Subtask 1.6: Plan weekly, twice weekly or more frequent coordination calls with Agency. Prepare draft agendas for calls. Initiate and respond to email communication with Agency staff. Actively troubleshoot to address issues that arise.	Calls at least 1x/week; agenda 2 business days prior to call; email/troubleshooting ongoing.
2. Web site	Subtask 2.1: Post TA resources, including audios arranged by contractor of past Webinars, slidedecks from past Webinars, slidedecks from conference presentations, including 508-compliant versions.	Webinar resources at least 2 days prior to Webinar date; 508 compliant versions within one week after receipt of slidedecks.
	Subtask 2.2: Maintain up-to-date calendar on the Web site, which includes upcoming Webinars, meetings, etc.	Daily
	Subtask 2.3: Screen potential new resources related to CVE agendas, and post those that are relevant and evidence-based on Web site library.	At least weekly
	Subtask 2.4: Track Web site activity by CVEs, such as monthly statistics by number of hits, unique visitors to the site, pages visited, etc.	At least monthly

3. Webinars	Subtask 3.1: In coordination with Agency staff, plan and implement 2-3 Webinars per month.	Monthly
	Subtask 3.2 Develop marketing plan for upcoming Webinars, including but not limited to keeping an up-to-date calendar on the Web site.	4/21/09
	Subtask 3.3: For each Webinar, in coordination with Agency staff, draft summary of Webinar content to be used in marketing Webinar; identify and suggest potential speakers and develop Webinar agenda.	2-3 months prior to Webinar; 1-2 months prior to Webinar
	Subtask 3.4: Market the Webinar; track Webinar registrants.	At least one month prior to Webinar; beginning at least one month prior to Webinar and continue through day after Webinar
	Subtask 3.5: Arrange audio recording of Webinar, review draft slides from speakers and make editorial suggestions.	At least one week prior to Webinar
	Subtask 3.6: Forward CVE registration list and draft AHRQ introductory talking points to AHRQ.	At least two days prior to Webinar
	Subtask 3.7: Create 508-compliant slides of Webinar, and post with original slidedeck and audio recording on Web site.	Within 1 week of Webinar
	Subtask 3.8: For each Webinar, host an online survey and analyze feedback.	Simultaneous with Webinar
	Subtask 3.9: Track Webinar participation over time by CVEs, by stakeholder categories.	Monthly
	Subtask 3.10: Develop and maintain a 6-month workplan; revisit and update quarterly in negotiation with Agency staff, for Webinar series. Include lessons learned from previous quarter activities.	5/1/09; update quarterly
4. In-person meetings	Subtask 4.1: Develop agenda in collaboration with Agency, suggesting potential speakers, involving select CVE stakeholders in sessions, identifying networking opportunities.	At least 3 months prior to meeting (first meeting planned for Spring 2009 which will

		require faster turn-around)
	Subtask 4.2: Work with speakers in refining the presentations to meet needs of CVEs, in critically reviewing slides.	At least 1 month prior to meeting
	Subtask 4.3: Identify potential hotels in DC metro area that meet needs (lodging and meeting room, including AV, unless Agency uses own facilities for meeting space), and select hotel in consultation with Agency. Enter into contract with hotel.	Within 2 weeks after award for Spring 2009 meeting; for future meetings, at least 5 months prior to meeting
	Subtask 4.4: Arrange food and refreshments for meeting participants.	At least 2 months prior to meeting
	Subtask 4.5: Arrange for logistics and travel for up to 144 CVE stakeholders (up to 6 from each CVE), including letters of invitation and subsequent tracking of RSVPs -- plus roughly 20 guests, 10 of which are speakers/faculty; arrange for reimbursement of all participants; pay honorarium for 10 faculty.	At least 2 months prior to meeting; within 2 weeks after meeting; within 2 weeks after meeting
	Subtask 4.6: Prepare meeting folders, which will include at least the following: agenda, participant lists (2 versions –sorted alphabetically by CVEs and sorted alphabetically by individuals), speaker bios, copy of presentation slidedecks, evaluation form.	At least 1 week prior to meeting
	Subtask 4.7: Prepare participant name tags, speaker tent cards.	At least 1 week prior to meeting
	Subtask 4.8: Create 508-compliant versions of speaker slidedecks and post along with original slidedecks on Web site.	Within 2 weeks after meeting
	Subtask 4.9: Analyze evaluation forms after the meeting.	Within 2 weeks after meeting
	Subtask 4.10: Develop and maintain a 6-month workplan, to be revisited and updated quarterly in negotiation with Agency staff, for meeting activities. Include lessons learned from previous quarter activities.	5/1/09
5. Workgroup on standard report elements	Subtask 5.1: Draft notes to CVE stakeholders to: identify interest in being involved, either as Workgroup member or reviewer; periodically summarize Workgroup deliberations.	5/1/09

	Subtask 5.2: Draft Workgroup highlights to document deliberations of Workgroup.	Within one week after meeting or call
	Subtask 5.3: Draft Workgroup working paper to summarize the aggregate deliberations of Workgroup (and explicitly flag next steps); Final paper	Draft within 2 weeks before final meeting or call; Final within 3 weeks after final meeting or call
	Subtask 5.4: Convene Webinar or conference call opportunities for Workgroup to vet deliberations with broader CVE community.	As needed
	Subtask 5.5: Arrange for meeting facilitator.	Within 2 months prior to first meeting or call
	Subtask 5.6: Draft agenda in collaboration with Agency, suggesting potential experts as warranted, involving select CVE stakeholders in sessions, identifying networking opportunities.	At least 2 weeks prior to each meeting or call
	Subtask 5.7: Work with experts and facilitator in refining the presentations to meet needs of CVEs, in critically reviewing slides.	Ongoing for duration of workgroup meetings/calls
	Subtask 5.8: Identify potential hotels in DC metro area that meet needs (lodging and meeting room, unless Agency uses own facilities for meeting space), and select hotel in consultation with Agency. Enter into contract with hotel.	At least 2 months prior to meeting
	Subtask 5.9: Arrange logistics and travel for CVE and expert participants, including email notification and subsequent tracking of RSVPs; reimburse participants and pay honorarium for faculty.	At least 1 month prior to meeting; Within 2 weeks after meeting
	Subtask 5.10: Arrange food and refreshments for meeting participants.	At least 1 month prior to meeting
	Subtask 5.11: Prepare meeting folders, which will include at least the following: agenda, copy of	At least 1 week prior to meeting

	presentation slidedecks.	
	Subtask 5.12: Prepare participant tent cards.	At least 1 week prior to meeting

If exercised, the following deliverable schedule applies to contract tasks during Option Years 1 – 4:

Task	Subtasks	Delivery
1. Administrative and planning	Subtask 1.1: Participate in planning/orientation meeting to discuss project goals, tasks, rough workplan, Agency-contractor coordination and transition of tasks, especially private Web site, from initial contractor. Prepare draft agenda for planning/orientation meeting.	within 1 week after award; agenda 2 business days prior to meeting
	Subtask 1.2: Convene a planning call specifically to arrange transition, particularly of private Web site. Prepare draft agenda before call.	Within 1 week after planning/orientation meeting; agenda 2 business days prior to call
	Subtask 1.3: Submit a draft workplan that spans four primary components (Web site, Webinars, in-person conferences, workgroup) and addresses the specific tasks outlined in the RFC; submit final workplan.	Draft within 2 weeks after planning/orientation meeting; Final within 3 weeks after planning/orientation meeting.
	Subtask 1.4: Project Lead to give at least 3 briefings per year on CVE technical assistance program, as requested by Agency staff. Task to include travel, lodging and preparation of briefing materials.	Within 1 year timeframe
	Subtask 1.5*: Submit monthly progress report for Agency to review hand-in-hand with monthly invoice. Report shall include activities performed, accomplishments, barriers, Web site activity, etc.	5 th of each month
	Subtask 1.6: Plan weekly, twice weekly or more frequent coordination calls with Agency. Prepare draft agendas for calls. Initiate and respond to email communication with Agency staff. Actively troubleshoot to address issues that arise.	Calls at least 1x/week; agenda 2 business days prior to call; email/troubleshooting ongoing.
	2. Web site	Subtask 2.1: Post TA resources, including audios arranged by contractor of past Webinars,

	slidedecks from past Webinars, slidedecks from conference presentations, including 508-compliant versions.	Webinar date; 508 compliant versions within one week after receipt of slidedecks.
	Subtask 2.2: Maintain up-to-date calendar on the Web site, which includes upcoming Webinars, meetings, etc.	Daily
	Subtask 2.3: Screen potential new resources related to CVE agendas, and post those that are relevant and evidence-based on Web site library.	At least weekly
	Subtask 2.4: Track Web site activity by CVEs, such as monthly statistics by number of hits, unique visitors to the site, pages visited, etc.	At least monthly
3. Webinars	Subtask 3.1: In coordination with Agency staff, plan and implement 2-3 Webinars per month.	Monthly
	Subtask 3.2 Develop marketing plan for upcoming Webinars, including but not limited to keeping an up-to-date calendar on the Web site.	Within 3 weeks of Agency exercising option year
	Subtask 3.3: For each Webinar, in coordination with Agency staff, draft summary of Webinar content to be used in marketing Webinar; identify and suggest potential speakers and develop Webinar agenda.	2-3 months prior to Webinar; 1-2 months prior to Webinar
	Subtask 3.4: Market the Webinar; track Webinar registrants.	At least one month prior to Webinar; beginning at least one month prior to Webinar and continue through day after Webinar
	Subtask 3.5: Arrange audio recording of Webinar, review draft slides from speakers and make editorial suggestions.	At least one week prior to Webinar
	Subtask 3.6: Forward CVE registration list and draft AHRQ introductory talking points to AHRQ.	At least two days prior to Webinar
	Subtask 3.7: Create 508-compliant slides of Webinar, and post with original slidedeck and audio recording on Web site.	Within 1 week of Webinar

	Subtask 3.8: For each Webinar, host an online survey and analyze feedback.	Simultaneous with Webinar
	Subtask 3.9: Track Webinar participation over time by CVEs, by stakeholder categories.	Monthly
	Subtask 3.10: Develop and maintain a 6-month workplan; revisit and update quarterly in negotiation with Agency staff, for Webinar series. Include lessons learned from previous quarter activities.	Within one month of Agency exercising option; update quarterly
4. In-person meeting	Subtask 4.1: Develop agenda in collaboration with Agency, suggesting potential speakers, involving select CVE stakeholders in sessions, identifying networking opportunities.	At least 3 months prior to meeting
	Subtask 4.2: Work with speakers in refining the presentations to meet needs of CVEs, in critically reviewing slides.	At least 1 month prior to meeting
	Subtask 4.3: Identify potential hotels in DC metro area that meet needs (lodging and meeting room, including AV, unless Agency uses own facilities for meeting space), and select hotel in consultation with Agency. Enter into contract with hotel.	At least 5 months prior to meeting
	Subtask 4.4: Arrange food and refreshments for meeting participants (using per diem).	At least 2 months prior to meeting
	Subtask 4.5: Arrange for logistics and travel for up to 144 CVE stakeholders (up to 6 from each CVE), including letters of invitation and subsequent tracking of RSVPs -- plus roughly 20 guests, 10 of which are speakers/faculty; arrange for reimbursement of all participants; pay honorarium for 10 faculty.	At least 2 months prior to meeting; within 2 weeks after meeting; within 2 weeks after meeting
	Subtask 4.6: Prepare meeting folders, which will include at least the following: agenda, participant lists (2 versions –sorted alphabetically by CVEs and sorted alphabetically by individuals), speaker bios, copy of presentation slidedecks, evaluation form.	At least 1 week prior to meeting
	Subtask 4.7: Prepare participant name tags, speaker tent cards.	At least 1 week prior to meeting
	Subtask 4.8: Create 508-compliant versions of speaker slidedecks and post along with original	Within 2 weeks after meeting

	slidedecks on Web site.	
	Subtask 4.9: Analyze evaluation forms after the meeting.	Within 2 weeks after meeting
	Subtask 4.10: Develop and maintain a 6-month workplan, to be revisited and updated quarterly in negotiation with Agency staff, for meeting activities. Include lessons learned from previous quarter activities.	Within first 2 weeks of Agency exercising option

* The Contracting Officer shall receive **one copy** of each deliverable denoted by an asterisk.

SECTION G - CONTRACT ADMINISTRATION DATA

G.1 KEY PERSONNEL

Pursuant to the Key Personnel clause incorporated in Section I of this contract, the following individual(s) is/are considered to be essential to the work being performed hereunder:

NAME

TITLE

(TO BE COMPLETED AT TIME OF AWARD)

The clause cited above contains a requirement for review and approval by the Contracting Officer of written requests for a change of Key Personnel reasonably in advance of diverting any of these individuals from this contract. Receipt of written requests at least 30 days prior to a proposed change is considered reasonable.

G.2 PROJECT OFFICER

The following Project Officer(s) will represent the Government for the purpose of this contract:

Peggy McNamara, AHRQ/CDOM

The Project Officer(s) is/are responsible for: (1) monitoring the contractor's technical progress, including the surveillance and assessment of performance and recommending to the contracting officer changes in requirements; (2) interpreting the statement of work and any other technical performance requirements; (3) performing technical evaluation as required; (4) performing technical inspections and acceptances required by this contract; and (5) assisting in the resolution of technical problems encountered during performance.

The Contracting Officer is the only person with authority to act as an agent of the Government under this contract. Only the Contracting Officer has authority to: (1) direct or negotiate any changes in the statement of work; (2) modify or extend the period of performance; (3) change the delivery schedule; (4) authorize reimbursement to the contractor of any costs incurred during the performance of this contract; or (5) otherwise change any terms and conditions of this contract.

The Government may unilaterally change its Project Officer designation.

G.3 INVOICE SUBMISSION

a. INVOICE SUBMISSION

Billing Instructions follow and are made part of this contract. Instructions and the following directions for the submission of invoices must be followed to meet the requirements of a "proper" payment request pursuant to FAR 32.9, and must be in accordance with the General Provisions clause 52.232-25 Prompt Payment (OCT 2003).

Invoices/financing requests shall be submitted in an original and two copies to:

Contracting Officer
Agency for Healthcare Research and Quality
Division of Contracts Management
540 Gaither Road
Rockville, Maryland 20850

G.4 INFORMATION ON VOUCHERS

- (1) The Contractor IS REQUIRED to include the following minimum information on vouchers:
 - (a) Contractor's name and invoice date;
 - (b) Contract Number;
 - (c) Description and price of services actually rendered;
 - (d) Other substantiating documentation or information as required by the contract;
 - (e) Name (where practicable), title, phone number, and complete mailing address or responsible official to whom payment is to be sent; and
 - (f) The Internal Revenue Service Taxpayer Identification Number.
- (2) The Contractor shall furnish the following minimum information in support of costs submitted:
 - (a) Direct Labor - include all persons, listing the person's name, title, number of hours or days worked, hourly rate (unburdened) the total cost per person and a total amount of this category;
 - (b) Fringe Costs - show rate, base and total amount as well as verification/allowability or rate changes (when applicable);
 - (c) Overhead or Indirect Costs - show rate, base and total amount as well as verification/allowability or rate changes (when applicable);
 - (d) Consultants - include the name, number of days or hours worked, a total amount per consultant and a total amount for this category;
 - (e) Travel - include for each airplane or train trip taken the name of the traveler, date of travel, destination, the transportation costs including ground transportation, shown separately, and per diem costs. Other travel costs shall also be listed. A total amount for this category shall be provided;
 - (f) Subcontractors - include for each subcontractor, the same data and level of detail that is being provided for the prime contractor. A total number for this category shall be provided.

- (g) Data Processing - include all non-labor costs, i.e., computer time, equipment purchase, lease or rental, data tapes, etc. A total amount for this category shall be provided.
 - (h) Other - include a listing of all other direct charges to the contract, i.e., office supplies, telephone, equipment rental, duplication, etc.
 - (i) Equipment Cost - itemize and identify separately from material costs including reference to approval in all cases;
 - (j) G&A - show rate, base and total as well as verification/allowability of rate changes (when applicable); and
 - (k) Fee - show rate, base and total;
 - (l) Current amount billed by individual cost element and total dollar amount; and
 - (m) Cumulative amount billed by individual cost element and total dollar amount.
- (3) Payment shall be made by:

PSC Finance
 Parklawn Building, Room 16-23
 5600 Fishers Lane
 Rockville, Maryland 20857
 Telephone Number (301) 443-6766

G.5 INDIRECT COST RATES and FEE

In accordance with Federal Acquisition Regulation (FAR) (48 CFR Chapter 1) Clause 52.216-7, Allowable Cost and Payment, incorporated by reference in this contract, in Part II, Section I, the primary contact point responsible for negotiating provisional and/or final indirect cost rates is the cognizant contracting official as set forth in FAR Subpart 42.7 - Indirect Cost Rates.

Reimbursement will be limited to the rates and time periods covered by the negotiated agreements. The rates, if negotiated, are hereby incorporated without further action of the contracting officer.

G.6 ELECTRONIC FUNDS TRANSFER

Pursuant to FAR 52.232-33, Payment by Electronic Funds Transfer - Central Contractor Registration (OCT 2003), the Contractor shall designate a financial institution for receipt of electronic funds transfer payments. This designation shall be submitted, in writing, to the finance office designated in the contract.

SECTION H - SPECIAL CONTRACT REQUIREMENTS

H.1 RELEASE AND USE AND COPYRIGHT OF DATA FIRST PRODUCED FROM WORK PERFORMED UNDER THIS CONTRACT

(a) *Release and Use – Data first produced in the performance of the Contract.* As permitted in FAR 52.227-17, the provisions of this Section H.1 shall apply to any release or use of data first produced in the performance of the Contract and any analysis, tools, methodologies, or recorded product based on such data.

(b) *Release and Use – Requirements related to confidentiality and quality.* To ensure public trust in the confidentiality protections afforded participants in Agency for Healthcare Research and Quality (AHRQ)-supported research, AHRQ requires and monitors compliance by its contractors with section 934(c) of the Public Health Service Act (PHS Act) (42 U.S.C. 299c-3(c)), which states in part that

No information, if the establishment or person supplying the information or described in it is identifiable, obtained in the course of activities undertaken or supported under this title, may be used for any purpose other than the purpose for which it was supplied unless such establishment or person has consented...to its use for such other purpose. Such information may not be published or released in other form if the person who supplied the information or who is described in it is identifiable unless such person has consented...to its publication or release in other form.

In addition to this requirement, section 933(b)(1) of the PHS Act (42 U.S.C. 299c-2(b)(1)) requires AHRQ to assure that statistics and analyses developed with Agency support are of high quality, comprehensive, timely, and adequately analyzed. Accordingly --

(1) prior to the release or use of data based upon work performed under this Contract, the Contractor agrees to consult with the Project and Contract Officers regarding the proposed release or use. The Contractor will in good faith consider, discuss, and respond to any comments or suggested modifications that are provided by AHRQ within two months of receiving the proposed release or use.

The purpose of such consultation is to assure that:

(A) identifiable information is being used exclusively for the purpose(s) for which it was supplied or appropriate consents have been obtained;
(B) the confidentiality promised to individuals and establishments supplying identifiable information or described in it is not violated; and
(C) the quality of statistical and analytical work meets the statutory standards cited above.

(2) The Contractor must satisfy conditions (1)(A) and (1)(B). At the conclusion of any consultation required by paragraph (b)(1) above, if AHRQ and the Contractor cannot agree that a proposed use or release satisfies condition (1)(C) above:

(A) the research professional at the Contractor responsible for the quality of the Contract work will, in advance of any release or use of such data, certify in a letter to the Contracting Officer what differences of opinion cannot be resolved regarding the

statutory standards referenced in condition (1)(C) and the basis for Contractor assertions that these standards have been met; and

(B) the Contractor must print prominently on the release or other product, or on any portion that is released, or state prior to any oral presentation or release of such material, the following disclaimer:

THIS PRESENTATION/ PUBLICATION/OR OTHER PRODUCT IS DERIVED FROM WORK SUPPORTED UNDER A CONTRACT WITH THE AGENCY FOR HEALTHCARE RESEARCH AND QUALITY (AHRQ) CONTRACT# . HOWEVER, THIS PRESENTATION/ PUBLICATION/OR OTHER PRODUCT HAS NOT BEEN APPROVED BY THE AGENCY.

(c) *Required Statement Regarding Protected Information.* On all written material or other recorded products, or preceding any presentation or other oral disclosure, release or use of material based on identifiable information obtained in the course of work performed under this contract, the Contractor shall make the following statement:

IDENTIFIABLE INFORMATION ON WHICH THIS REPORT, PRESENTATION, OR OTHER FORM OF DISCLOSURE IS BASED IS PROTECTED BY FEDERAL LAW, SECTION 934(c) OF THE PUBLIC HEALTH SERVICE ACT, 42 U.S.C. 299c-3(c). NO IDENTIFIABLE INFORMATION ABOUT ANY INDIVIDUALS OR ENTITIES SUPPLYING THE INFORMATION OR DESCRIBED IN IT MAY BE KNOWINGLY USED EXCEPT IN ACCORDANCE WITH THEIR PRIOR CONSENT. ANY CONFIDENTIAL IDENTIFIABLE INFORMATION IN THIS REPORT OR PRESENTATION THAT IS KNOWINGLY DISCLOSED IS DISCLOSED SOLELY FOR THE PURPOSE FOR WHICH IT WAS PROVIDED.

(d) *Copyright – Data first produced in the performance of the Contract.* Subject to the terms of this Section regarding release and use of data, AHRQ, through its Contracting Officer, will grant permission under FAR 52.227-17(c)(1)(i) to the Contractor to establish claim to copyright subsisting in scientific and technical articles based on or containing data first produced in the performance of this contract that are submitted for publication in academic, technical or professional journals, symposia proceedings or similar works. When claim to copyright is made, the Contractor shall affix the applicable copyright notice of 17 U.S.C. 401 or 402 and acknowledgment of Government sponsorship (including contract number) to the data when such data are delivered to the Government, as well as when the data are published or deposited for registration as a published work in the U.S. Copyright Office. In such circumstances, the Contractor hereby agrees to grant to AHRQ, and others acting on its behalf, a paid-up, nonexclusive, irrevocable, worldwide license for all such data to reproduce, prepare derivative works, distribute copies to the public, and perform publicly and display publicly, by or on behalf of AHRQ. A description of this license will be incorporated into the copyright notices required above.

(e) *Subcontracts.* Whenever data, analyses, or other recorded products are to be developed by a subcontractor under this Contract, the Contractor must include the terms of H.1 in the subcontract, without substantive alteration, with a provision that the subcontractor may not further assign to another party any of its obligations to the Contractor. No clause may be included to diminish the Government's stated

requirements or rights regarding release or use of products or materials based on data derived from work performed under this contract.

H.2 LACK OF COMPLIANCE WITH REQUIREMENTS FOR RELEASE OR USE

Failure to submit materials for statutorily mandated confidentiality and statistical and analytic quality reviews as required by Section H.1 of this contract will be viewed as a material violation and breach of the terms of this contract, as the requirements of this provision are necessary for AHRQ to carry out its statutory obligations and responsibilities. Records of the Contractor's performance, including the Contractor's performance pertaining to this Contract, will be maintained in AHRQ's Contracts Management Office and will be considered as an element of past performance which is part of all subsequent competitive contract proposal reviews.

H.3 SUBCONTRACTS

Award of any subcontract is subject to the prior written approval of the Contracting Officer upon review of the supporting documentation. Failure to obtain prior written approval of the Contracting Officer may result in disallowance of use of Federal funds to cover services under the subcontract. The contractor must include in any subcontracts executed or used to provide the support specified in this contract the terms of requirements H.1, H.2, H.7, H.9 and H.10. These requirements are to be included without substantive alteration, and no clause may be included to diminish these requirements. If approved, a copy of the signed subcontract shall be provided to the Contracting Officer.

H.4 LATE PAYMENTS TO THE GOVERNMENT

Late payment of debts owed the Government by the Contractor, arising from whatever cause, under this contract/order shall bear interest at a rate or rates to be established in accordance with the Treasury Fiscal Requirements Manual. For purposes of this provision, late payments are defined as payments received by the Government more than 30 days after the Contractor has been notified in writing by the Contracting Officer of:

- a. The basis of indebtedness.
- b. The amount due.
- c. The fact that interest will be applied if payment is not received within 30 days from the date of mailing of the notice.
- d. The approximate interest rate that will be charged.

H.5 PRIVACY ACT

The Privacy Act clauses cited in Section I (FAR 52.224-1 and 52.224-2) are applicable to the consultant records kept by the Contractor for the Agency for Healthcare Research and Quality.

You are hereby notified that the Contractor and its employees are subject to criminal penalties for violations of the Act (5 U.S.C. 552a(i)) to the same extent as employees of the Department. The Contractor shall assure that each Contractor employee is aware that he/she can be subjected to criminal penalties for violations of the Act. Disposition

instructions: Records are to be destroyed after contract closeout is completed and final payment is made and in accordance with IRS regulations.

H.6 PRO-CHILDREN ACT of 1994

The Pro-Children Act of 1994, P.L. 103-227, imposes restrictions on smoking where certain federally funded children’s services are provided. P.L. 103-227 states in pertinent part:

PHS strongly encourages all grant and contract recipients to provide a smoke-free workplace and to promote the non-use of all tobacco products. In addition, P.L. 103-227, the Pro-Children Act of 1994, prohibits smoking in certain facilities (or in some cases, any portion of a facility) in which regular or routine education, library, day care, health care or early childhood development services are provided to children.”

H.7 SALARY CAP GUIDE NOTICE

Pursuant to the applicable HHS appropriations acts cited in the table below, the Contractor shall not use contract funds to pay the direct salary of an individual at a rate in excess of the salary level in effect on the date the expense is incurred as shown in the table below.

For purposes of the salary limitation, the terms direct salary, salary, and institutional base salary have the same meaning and are collectively referred to as direct salary in this clause. An individual's direct salary is the annual compensation that the Contractor pays for an individual's appointment whether that individual's time is spent on research, teaching, patient care, or other activities. Direct salary excludes any income that an individual may be permitted to earn outside of duties to the Contractor. Direct salary also excludes fringe benefits, overhead, and general and administrative expenses (also referred to as indirect costs or facilities and administrative [F&A] costs).

The salary rate limitation also applies to individuals performing under subcontracts. However, it does not apply to fees paid to consultants. If this is a multiple-year contract, it may be subject to unilateral modification by the Contracting Officer to ensure that an individual is not paid at a rate that exceeds the salary rate limitation provision established in the HHS appropriations act in effect when the expense is incurred regardless of the rate initially used to establish contract funding.

Public law	Period Covered	Salary Limitation (based on Executive Level I)
P.L. 110-161, Consolidated Appropriations Act, 2008	1/1/08 – Until revised	\$191,300

Executive Level salaries for the current and prior periods can be found at the following Web site: <http://www.opm.gov/oca/05tables/html/ex.asp>. Click on "Salaries and Wages" and then scroll to the bottom of the page to select the desired period.

H.8 PERFORMANCE EVALUATION AND AWARD FEE

The contract will be awarded and managed as a Performance-Based Service Contract (PBSC), using the Award Fee mechanism.

1. Performance Evaluation Factors

The Government will evaluate the following factors of the Contractor's performance:

Performance Factor	Related SOW Tasks	Weight (Year 1)	Weight (Years 2-5) *
1. Perform administrative and planning activities.	Task 1	25%	25%
2. Maintain and update private Web site for CVEs.	Task 2	15%	15%
3. Convene Webinar series.	Task 3	25%	25%
4. Convene two in-person meetings per year for approximately 175 persons each.	Task 4	25%	25%
5. Convene Workgroup on standard report elements.	Task 5	10%	10%
6. Facilitate including new CVEs in CVE Learning Network. (optional)	Task 6	**	**
7. Convene one or more other workgroups on topics specified by AHRQ. (optional)	Task 7	**	**
8. Provide one-on-one consulting to address CVE TA needs. (optional)	Task 8	**	**
9. Refine or develop a demand-driven, applied, evidence-based tool or product. (optional)	Task 9	**	**

* Weights for out years may be adjusted depending on potential changes in priorities.

** Weights for un-priced optional tasks (Tasks 6-9) will be specified as options are exercised. These may require adjustments in weights for Tasks 1-5.

2. Performance Requirements Summary

Exhibit 1 summarizes the performance standards and Government surveillance methods for each of the above performance factors.

3. Award Fee Plan

(Note to Offerors: The Government anticipates a Cost-Plus-Award-Fee (CPAF) contract to result from this solicitation. In this type of contract, the Contractor will receive a small base fee. In addition to the base fee, award fee will be tied to the evaluation of specific products and services in accordance with Attachment 4- Performance Requirements Summary.

The Agency's decision to pay or not to pay Award Fee in no way alters the Contractor's responsibilities to perform any services or produce any deliverables required by this

contract. The Agency's decision to pay or not to pay Award Fee in no way alters the Agency's obligation to pay the Contractor for satisfactory deliverables in accordance with this contract.

Award Fee is available for services and products identified below.

Annual Amounts Available for Award Fee (to be evaluated semi-annually):

Contract Year

Performance Evaluation Factor	% of Award Fee Pool *	Award for Evaluation Unsatisfactory Rating score of below 60 reduces Base Fee by 50% for rating period.	Award for Evaluation Satisfactory 60-79 score 40%	Award for Evaluation Exceeds Expectations 80-89 score 80%	Award for Evaluation Outstanding 90-100 score 100%
	Year 1 _____ Years 2-5				
Perform administrative and planning activities.	25% _____ 25%				
Maintain and update private Web site for CVEs.	15% _____ 15%				
Convene Webinar series.	25% _____ 25%				
Convene two in-person meetings per year for approximately 175 persons each.	25% _____ 25%				
Convene Workgroup on standard report elements.	10% _____ 10%				
Facilitate including new CVEs in CVE Learning	** _____				

Performance Evaluation Factor	% of Award Fee Pool * Year 1 _____ Years 2-5	Award for Evaluation Unsatisfactory Rating score of below 60 reduces Base Fee by 50% for rating period.	Award for Evaluation Satisfactory 60-79 score 40%	Award for Evaluation Exceeds Expectations 80-89 score 80%	Award for Evaluation Outstanding 90-100 score 100%
Network. (optional)	** _____				
Convene one or more other workgroups on topics specified by AHRQ. (optional)	** _____				
Provide one-on-one consulting to address CVE TA needs. (optional)	** _____				
Refine or develop a demand-driven, applied, evidence-based tool or product. (optional)	** _____				

* Weights for out years may be adjusted depending on potential changes in priorities.

** Weights for un-priced optional tasks (Performance Factors 6-9) will be specified as options are exercised. These may require adjustments in weights for Performance Factors 1-5.

On a semi-annual basis, the Contractor's products and services will be evaluated in terms of the above performance factors by an Award Fee Evaluation Group (AFEG). The AFEG will consist of the Project Officer, the Contracting Officer or his/her designee, and, as appropriate, other Government officials selected by the Project Officer (depending on specific expertise) and approved by the Contracting Officer.

Each member of the Award Fee Evaluation Group will evaluate the Contractor's performance against the performance standards of quality and timeliness listed in Exhibit 1.

A numerical rating scale of 0 to 100 will be used. The scale is defined as follows:

Definition of Rating	Adjective Rating	Numerical Rating	Fee %
Outstanding - Contractor's performance exceeds standards by substantial margin; the performance monitor can cite few areas for improvement, all of which are minor. Required rework is minimal.	Outstanding	90 - 100	100%
Exceeds Expectations - Contractor's performance exceeds standards, and although there may be several areas for improvement, these are more than offset by better performance in other areas. Required rework is limited.	Exceeds Expectations	80 – 89	80%
Satisfactory - Contractor's performance is generally satisfactory, and areas for improvement are approximately offset by better performance in other areas. Required rework is moderate.	Satisfactory	60 – 79	40%
Unsatisfactory - Contractor's performance is less than standards by a substantial margin, and the performance monitor can cite many areas for improvement which are not offset by better performance in other areas. Required rework is extensive.	Unacceptable	Below 60	Base Fee Reduced by 50%

Each member of the AFEG will give each performance factor a numerical rating, and those ratings will be averaged. An average score of less than 60 (Unsatisfactory) will result in a reduction in the base fee of 50% for the performance factor for the rating period. An average score of 60-79 (Satisfactory) will result in award of 40% of the Award Fee for the performance factor. An average score of 80-89 (Exceeds Expectations) will result in award of 80% of the Award Fee, and an average of 90-100 (Outstanding) will result in award of 100% of the Award Fee for the performance factor. **The Award Fee determinations are not subject to the disputes clause.**

H.9 SECURITY AND PRIVACY REQUIREMENTS

- 1.0 In compliance with OMB Circular A-130, "Management of Federal Information Resources," the Contractor shall prepare an IT Security Plan that will include a control process to ensure that appropriate management, operational and technical safeguards are incorporated into all AHRQ IT Applications. The Contractor shall use the guidance provided in the documentation standards of the National Institute of Standards and Technology; NIST Special Publication 800-18 Rev. 1 "Guide for Developing Security Plans for Information Technology Systems" when developing the IT Security Plan.

In addition, the contractor shall comply with the IT Application(s) security requirements needed for the contract as set forth in the Statement of Work. The Contractor further agrees to include this provision in any subcontract awarded pursuant to the prime contract. The draft and final IT Security Plan will be submitted as a deliverable to the Agency for Healthcare and Research (AHRQ) Project Officer for review and approval.

- 1.1 The Contractor shall insure that PII (Personally Identifiable Information, defined by FOIA II) data is never allowed on a system with public (Internet) access.
- 1.2 The Contractor shall conduct and maintain a Privacy Impact Assessment (PIA) as defined by Section 208 of the E-Government Act of 2002 and FAR Clause 52-239-1. Periodic reviews shall be conducted to determine if a major change to the system has occurred, and if a PIA update is needed.
- 1.3 Contractor shall abide by all requirements of the Privacy Act of 1974 and FAR Clause 52-239-1. Pursuant to those requirements, contractor will publish a System of Record (SOR) notice in the Federal Register when a new System of Records is to be created and will publish an updated SOR notice following a "major change" as defined by Office of Memorandum and Budget Memorandum 03-22 or subsequent replacement guidance.
- 2.0 Information Systems Security Training:
AHRQ and HHS policy requires contractors receive security training commensurate with their responsibilities for performing work under the terms and conditions of their contractual agreements.

The contractor will be responsible for assuring that each contractor employee has completed the Security Awareness Training as required by AHRQ prior to performing any contract work, and on an annual basis thereafter, during the period of performance of the contract. The contractor shall maintain a listing of all individuals who have completed this training and shall submit this listing to the Project Officer.

- 2.1 Additional security training requirements commensurate with the position may be required as defined in NIST Special Publication 800-16, Information Technology Security Training Requirements (<http://csrc.nist.gov/publications/nistpubs/800-16/800-16.pdf>). The document above provides information about information security training that may be useful to potential offerors. The contractor shall maintain a list of all individuals who have significant security responsibilities that have completed the AHRQ_Combined_Security_Training and submit the list to the Project Officer.
- 3.0 Access to HHS electronic mail:
All Contractor staff that have access to and use of HHS electronic mail (e-mail) must identify themselves as contractors on all outgoing e-mail messages, including those that are sent in reply or are forwarded to another user. To best comply with this requirement, the contractor staff shall set up an e-mail signature ("AutoSignature") or an electronic business card ("V-card") on each contractor employee's computer system and/or Personal Digital Assistant (PDA) that will automatically display "Contractor" in the signature area of all e-mails sent.
- 4.0 Commitment to Protect Departmental Information Systems and Data

Contractor Agreement: The Contractor shall not release, publish, or disclose Departmental information to unauthorized personnel, and shall protect such information in accordance with provisions of the following laws and any other pertinent laws and regulations governing the confidentiality of sensitive information:

- 18 U.S.C. 641 (Criminal Code: Public Money, Property or Records)
- 18 U.S.C. 1905 (Criminal Code: Disclosure of Confidential Information)
- Public Law 96-511 (Paperwork Reduction Act)

- 4.1 Contractor-Employee Non-Disclosure Agreements:
Each contractor employee who may have access to sensitive Department information under this contract shall complete Commitment to Protect Non-Public Information - Contractor Agreement. A copy of each signed and witnessed Non-Disclosure agreement shall be submitted to the Project Officer prior to performing any work under the contract.

References

- (1) HHS Information Security Program Policy:
<http://www.hhs.gov/ohr/manual/pssh.pdf>
- (2) HHS Personnel Security/Suitability Handbook:
<http://www.hhs.gov/ohr/manual/pssh.pdf>
- (3) NIST Special Publication 800-16, Information Technology Security Training Requirements:
<http://csrc.nist.gov/publications/nistpubs/800-16/800-16.pdf>
Appendix A-D: <http://csrc.nist.gov/publications/nistpubs/800-16/AppendixA-D.pdf>
- (4) NIST SP 800-18, Guide for Developing Security Plans for Information Technology Systems: <http://csrc.nist.gov/publications/nistpubs/index.html>
- (5) NIST SP 800-60, Guide for Mapping Types of Information and Information Systems to Security Categories, Volume I:
<http://csrc.nist.gov/publications/nistpubs/800-60/SP800-60V1-final.pdf>
- (6) NIST SP 800-60, Guide for Mapping Types of Information and Information Systems to Security Categories, Volume II:
<http://csrc.nist.gov/publications/nistpubs/800-60/SP800-60V2-final.pdf>
- (7) NIST SP 800-37, Guide for Security Certification and Accreditation of Federal Information Systems:
<http://csrc.nist.gov/publications/nistpubs/800-37/SP800-37-final.pdf>
- (8) Recommended Security Controls for a Federal Information System:
<http://csrc.nist.gov/publications/nistpubs/800-53/SP800-53.pdf>
- (9) NIST SP 800-26, Security Self Assessment Guide for Information Technology Systems:
<http://csrc.nist.gov/publications/nistpubs/800-26/sp800-26.pdf>
- (10) NIST SP 800-64, Security Considerations in the Information System Development Life Cycle:
<http://csrc.nist.gov/publications/nistpubs/800-64/NIST-SP800-64.pdf>
- (11) Federal Information Processing Standards, Standards for Security Categorization of Federal Information and Information Systems:
<http://csrc.nist.gov/publications/fips/fips199/FIPS-PUB-199-final.pdf>
- (12) Federal Information Processing Standards, Minimum Security Requirements for a Federal Information System:
<http://csrc.nist.gov/publications/fips/fips200/FIPS-200-final-march.pdf>
- (13) AHRQ will provide in electronic format the AHRQ_Combined_Security Training slides.

H.10 SECTION 508 COMPLIANCE

This language is applicable to Statements of Work (SOW) or Performance Work Statements (PWS) generated by the Department of Health and Human Services (HHS) that require a contractor or consultant to (1) produce content in any format that could be placed on a Department-owned or Department-funded Web site; or (2) write, create or produce any communications materials intended for public or internal use; to include reports, documents, charts, posters, presentations (such as Microsoft PowerPoint) or video material that could be placed on a Department-owned or Department-funded Web site.

Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d) requires Federal agencies to purchase electronic and information technologies (EIT) that meet specific accessibility standards. This law helps to ensure that federal employees with disabilities have access to, and use of, the information and data they need to do their jobs. Furthermore, this law ensures that members of the public with disabilities have the ability to access government information and services.

There are three regulations addressing the requirements detailed in Section 508. The Section 508 technical and functional standards are codified at 36 CFR Part 1194 and may be accessed through the Access Board's Web site at <http://www.access-board.gov>. The second regulation issued to implement Section 508 is the Federal Acquisition Regulation (FAR). FAR Part 39.2 requires that agency acquisitions of Electronic and Information Technology (EIT) comply with the Access Board's standards. The entire FAR is found at Chapter 1 of the Code of Federal Register (CFR) Title 48, located at <http://www.acquisition.gov>. The FAR rule implementing Section 508 can be found at <http://www.section508.gov>. The third applicable regulation is the HHS Acquisition Regulation (HHSAR).

Regardless of format, all Web content or communications materials produced for publication on or delivery via HHS Web sites - including text, audio or video - must conform to applicable Section 508 standards to allow federal employees and members of the public with disabilities to access information that is comparable to information provided to persons without disabilities. All contractors (including subcontractors 1) or consultants responsible for preparing or posting content intended for use on an HHS-funded or HHS-managed Web site must comply with applicable Section 508 accessibility standards, and where applicable, those set forth in the referenced policy or standards documents below. Remediation of any materials that do not comply with the applicable provisions of 36 CFR Part 1194 as set forth in the SOW or PWS, shall be the responsibility of the contractor or consultant retained to produce the Web-suitable content or communications material.

1 - Prime contractors may enter into subcontracts in the performance of a Federal contract, but the prime remains obligated to deliver what is called for under the contract.

References:

HHS Policy for Section 508 Electronic and Information Technology (E&IT) (January 2005): http://www.hhs.gov/od/Final_Section_508_Policy.html

HHS Section 508 Web site: <http://508.hhs.gov/>

HHS ASPA Web Communications Division Web site:
<http://www.hhs.gov/web/policies/index.html>

US General Services Administration (GSA) Section 508 Web site:
<http://www.section508.gov/index.cfm>

SECTION I
CONTRACT CLAUSES
GENERAL CLAUSES FOR A COST-PLUS-A-FIXED-FEE CONTRACT

CLAUSES INCORPORATED BY REFERENCE (FEBRUARY 1998)

This contract incorporates the following clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this address: <http://www.arnet.gov/far/>

I. FEDERAL ACQUISITION REGULATION (FAR) (48 CFR CHAPTER 1)
CLAUSES

FAR Clause No.	Title and Date
52.203-3	Gratuities (APR 1984)
52.203-5	Covenant Against Contingent Fee (APR 1984)
52.203-6	Restrictions on Subcontractor Sales to the Government (SEPT 2006)
52.203-7	Anti-Kickback Procedures (JUL 1995)
52.203-8	Cancellation, Rescission, and Recovery of Funds for Illegal or Improper Activity (JAN 1997)
52.203-10	Price or Fee Adjustment for Illegal or Improper Activity (JAN 1997)
52.203-12	Limitation on Payments to Influence Certain Federal Transactions (SEP 2007)
52.203-14	Display of Hotline Poster(s) (DEC 2007) (Department of Health and Human Services Poster at: http://www.oig.hhs.gov/hotline/OIG_Hotline_Poster.pdf)
52.204-4	Printing or Copying Double-Sided on Recycled Paper (AUG 2000)
52.204-7	Central Contractor Registration. (APR 2008)
52.209-6	Protecting the Government's Interest When Subcontracting With Contractors Debarred, Suspended, or Proposed for Debarment (SEPT 2006)
52.215-2	Audit and Records - Negotiation (JUN 1999)
52.215-8	Order of Precedence-Uniform Contract Format (Oct 1997)

52.215-10	Price Reduction for Defective Cost or Pricing Data (OCT 1997) (applicable to contract actions over \$550,000)
52.215-12	Subcontractor Cost or Pricing Data (OCT 1997) (applicable to contract actions over \$550,000)
52.215-15	Pension Adjustments and Asset Reversions (OCT 2004)
52.215-18	Reversion or Adjustment of Plans for Postretirement Benefits (PRB) Other Than Pensions (JUL 2005)
52.215-19	Notification of Ownership Changes (OCT 1997)
52.216-7	Allowable Cost and Payment (DEC 2002)
52.216-8	Fixed Fee (MAR 1997)
52.217-2	Cancellation Under Multiyear Contracts (OCT 1997)
52.217-9	Option to Extend the Term of the Contract (MAR 2000)
52.217-8	Option to Extend Services (NOV 1999)
52.219-9	Small Business Subcontracting Plan (APR 2008)
52.219-8	Utilization of Small Business Concerns (MAY 2004)
52.219-16	Liquidated Damages - Subcontracting Plan (JAN 1999)
52.219-28	Post-Award Small Business Program Representation (JUNE 2007)
52.222-2	Payment for Overtime Premiums (JUL 1990). The amount in paragraph (a) is "zero" unless different amount is separately stated elsewhere in contract.
52.222-3	Convict Labor (JUNE 2003)
52.222-26	Equal Opportunity (APR 2002)
52.222-35	Equal Opportunity for Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans. (SEPT 2006)
52.222-36	Affirmative Action for Workers With Disabilities (JUNE 1998)
52.222-37	Employment Reports on Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans. (SEPT 2006)
52.222-39	Notification of Employee Rights Concerning Payment of Union Dues or Fees (DEC 2004)

52.223-6	Drug Free Workplace (MAY 2001)
52.223-14	Toxic Chemical Release Reporting (AUG 2003)
52.224-1	Privacy Act Notification (APR 1984)
52.224-2	Privacy Act (APR 1984)
52.225-1	Buy American Act - Supplies (JUNE 2003)
52.225-13	Restrictions on Certain Foreign Purchases (JUNE 2008)
52.227-1	Authorization and Consent (DEC 2007)
52.227-2	Notice and Assistance Regarding Patent and Copy- Right Infringement (DEC 2007)
52.227-3	Patent Indemnity (APRIL 1984)
52.227-17	Rights in Data – Special Works (DEC 2007)
52.228-7	Insurance-Liability to Third Persons (MAR 1996)
52.230-2	Cost Accounting Standards (OCT 2008)
52.230-3	Disclosure and Consistency of Cost Accounting Practices (OCT 2008)
52.230-6	Administration of Cost Accounting Standards (MAR 2008)
52.230-7	Proposal Disclosure – Cost Accounting Practice Changes (APR 2005)
52.232-9	Limitation on Withholding of Payments (APRIL 1984)
52.232-17	Interest (OCT 2008)
52.232-18	Availability of Funds (APRIL 1984)
52.232-22	Limitation of Funds (APR 1984)
52.232-23	Assignment of Claims (JAN 1986)
52.232-25	Prompt Payment (OCT 2008)
52.232-33	Payment by Electronic Funds Transfer Central Contractor Registration (Oct 2003)
52.233-1	Disputes (JULY 2002)
52.233-3	Protest After Award (AUG 1996) Alternate I (JUNE 1985)

52.233-4	Applicable Law for Breach of Contract Claim (OCT 2004)
52.237-10	Identification of Uncompensated Overtime (Oct 1997)
52.242-1	Notice of Intent to Disallow Costs (APRIL 1984)
52.242-3	Penalties for Unallowable Costs (MAY 2001)
52.242-4	Certification of Final Indirect Costs (Jan 1997)
52.242-13	Bankruptcy (JULY 1995)
52.243-2	Changes - Cost Reimbursement (AUG 1987) - Alternate II (APRIL 1984)
52.244-2	Subcontracts (JUNE 2007)
52.244-5	Competition in Subcontracting (DEC 1996)
52.245-5	Government Property (Cost Reimbursement, Time-and-Material, or Labor-Hour Contract (MAY 2004)
52.246-5	Inspection of Services-Cost Reimbursement (APRIL 1984)
52.246-23	Limitation of Liability-(FEB 1997)
52.248-1	Value Engineering (FEB 2000)
52.249-6	Termination (Cost-Reimbursement) (MAY 2004)
52.249-14	Excusable Delays (APRIL 1984)
52.251-1	Government Supply Sources (APRIL 1984)
52.253-1	Computer Generated Forms (JAN 1991)

II. DEPARTMENT OF HEALTH AND HUMAN SERVICES ACQUISITION
REGULATION (HHSAR) (48 CFR CHAPTER 3) CLAUSES

HHSAR Clause No.	Title and Date
352.202-1	Definitions (JAN 2006) Alternate h
352.223-70	Safety and Health (JAN 2006)
352.224-70	Confidentiality of Information (JAN 2006)
352.228-7	Insurance - Liability to Third Persons (DEC 2006)

352.232-9	Withholding of Contract Payments (JAN 2006)
352.233-70	Litigation and Claims (JAN 2006)
352.242-71	Final Decisions on Audit Findings (APRIL 1984)
352.270-1	Accessibility of Meetings, Conferences, and Seminars to Persons With Disabilities (DEC 2006)
352.270-6	Publication and Publicity (JAN 2006)
352.270-7	Paperwork Reduction Act (JAN 2006)
352.270-8	Protection of Human Subjects (JAN 2001)

The following clause is applicable to this contract and is provided in full text:

KEY PERSONNEL (APR 1984) (HHSAR 352.270-5)

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 this clause. The contract may be amended from time to time during the course of the contract to either add or delete personnel, as appropriate.

(End of clause)

OPTION TO EXTEND THE TERM OF THE CONTRACT (MAR 2000) 52.217-9

(a) The Government may extend the term of this contract by written notice to the Contractor within 30 days of the expiration date of the contract; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least 60 days before the contract expires. The preliminary notice does not commit the Government to an extension.

(b) If the Government exercises this option, the extended contract shall be considered to include this option clause.

(c) The total duration of this contract, including the exercise of any options under this clause, shall not exceed 60 months.

(End of clause)

PART III- LIST OF DOCUMENTS, EXHIBITS AND ATTACHMENTS

SECTION J - LIST OF ATTACHMENTS

1. Past Performance Questionnaire and Contractor Performance Form
2. Proposal Intent Form
3. Breakdown of Proposed Estimated Cost and Labor Hours
4. Performance Requirements Summary
5. Slidedeck of CVE Program
6. Slidedeck of CVE Learning Network
7. Compendium of TA Needs Identified by First 14 CVEs – Excel Spreadsheet
8. Sample Pages from Private Web Site
9. Agenda for September 2008 Meeting of CVEs
10. Examples of Past Webinar Agendas

NOTE: ALL ATTACHMENTS ARE LOCATED AT THE END OF THIS REQUEST FOR PROPOSAL.

PART IV. REPRESENTATIONS AND INSTRUCTIONS

SECTION K

REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS

K.1	HHSAR 315.204-5	Representations and Instructions
K.2.	FAR 52.204-8	Annual Representations and Certifications (JAN 2006)
K.3.	FAR 52.222-21	Prohibition of Segregated Facilities (FEB 1999)
K.4.	FAR 52.230-1	Cost Accounting Standards Notices and Certification (JUNE 2000)
K.5.	FAR 15.406-2	Certificate of Current Cost and Pricing Data
K.6.	P.L. 103-227	Certification Regarding Environmental Tobacco Smoke
K.7.	HHSAR 352.204	Certification of Filing and Payment of Federal Taxes.

K.I REPRESENTATIONS AND INSTRUCTIONS

(a) Section K, Representations, certifications, and other statements of offerors.

(1) This section shall begin with the following and continue with the applicable representations and certifications:

TO BE COMPLETED BY THE OFFEROR: (The Representations and Certifications must be executed by an individual authorized to bind the Offeror.) The Offeror makes the following Representations and Certifications as part of its proposal. (Check or complete all appropriate boxes or blanks on the following pages.)

(Name of Offeror)

(RFP No.)

(Signature of Authorized Individual)

(Date)

(Typed Name of Authorized Individual)

NOTE: The penalty for making false statements in offers is prescribed in 18 U.S.C. 1001.

K.2. ANNUAL REPRESENTATIONS AND CERTIFICATIONS (JAN 2005) (FAR 52.204-8)

(a)(1) If the clause at 52.204-7, Central Contractor Registration, is included in this solicitation, paragraph (b) of this provision applies.

(2) If the clause at 52.204-7 is not included in this solicitation, and the offeror is currently registered in CCR, and has completed the ORCA electronically, the offeror may choose to use paragraph (b) instead of completing the corresponding individual representations and certifications in the solicitation. The offeror shall indicate which option applies by checking one of the following boxes:

(i) Paragraph (b) applies

(ii) Paragraph (b) does not apply and the offeror has completed the individual representations and certification in the solicitation.

(b) The offeror has completed the annual representations and certifications electronically via the Online Representations and Certifications Application (ORCA) website at <http://orca/bpn.gov>. After reviewing the ORCA database information, the offeror verifies by submission of the offer that the representations and certifications currently posted electronically have been entered or updated within the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard applicable to the NAICS code referenced for this solicitation), as of the date of this offer and are incorporated in this offer by reference (see FAR 4.1201); except for the changes identified below (offeror to insert changes, identifying change by clause number, title, date). These amended representation(s) and/or certification(s) are also incorporated in this offer and are current, accurate, and complete as of the date of this offer.

FAR Clause#	Title	Date	Change
-------------	-------	------	--------

Any changes provided by the offeror are applicable to this solicitation only, and do not result in an update to the representations and certifications posted on ORCA.

(End of provision)

K.3. PROHIBITION OF SEGREGATED FACILITIES
(FEB 1999) (FAR 52.222-21)

(a) "Segregated facilities," as used in this clause, means any waiting rooms, work areas, rest rooms and wash rooms, restaurants and other eating areas, time clocks, locker rooms and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation, and housing facilities provided for employees, that are segregated by explicit directive or are in fact segregated on the basis of race, color, religion, or national origin because of written or oral policies or employee custom. The term does not include separate or single-user rest rooms or necessary dressing or sleeping areas provided to assure privacy between the sexes.

(b) The Contractor agrees that it does not and will not maintain or provide for its employees any segregated facilities at any of its establishments, and that it does not and will not permit its employees to perform their services at any location under its control where

segregated facilities are maintained. The Contractor agrees that a breach of this clause is a violation of the Equal Opportunity clause in this contract.

- (c) The Contractor shall include this clause in every subcontract and purchase order that is subject to the Equal Opportunity clause of this contract.
(End of Clause)

**K.4. COST ACCOUNTING STANDARDS NOTICES AND
CERTIFICATION
(FAR 52.230-1) (JUNE 2000)**

NOTE: This notice does not apply to small businesses or foreign governments. This notice is in three parts, identified by Roman numerals I through III.

Offerors shall examine each part and provide the requested information in order to determine Cost Accounting Standards (CAS) requirements applicable to any resultant contract.

If the offeror is an educational institution, Part II does not apply unless the contemplated contract will be subject to full or modified CAS-coverage pursuant to 48CFR 9903.201-2(c)(5) or 9903.201-2(c)(6), respectively.

I. Disclosure Statement - Cost Accounting Practices and Certification

(a) Any contract in excess of \$500,000 resulting from this solicitation, will be subject to the requirements of the Cost Accounting Standards Board (48 CFR, Chapter 99), except for those contracts which are exempt as specified in 48 CFR 9903.201-1.

(b) Any offeror submitting a proposal which, if accepted, will result in a contract subject to the requirements of 48 CFR Chapter 99 must, as a condition of contracting, submit a Disclosure Statement as required by 48 CFR 9903.202. When required, the Disclosure Statement must be submitted as a part of the offeror's proposal under this solicitation unless the offeror has already submitted a Disclosure Statement disclosing the practices used in connection with the pricing of this proposal. If an applicable Disclosure Statement has already been submitted, the offeror may satisfy the requirement for submission by providing the information requested in paragraph (c) of Part I of this provision. Caution: In the absence of specific regulations or agreement, a practice disclosed in a Disclosure Statement shall not, by virtue of such disclosure, be deemed to be a proper, approved, or agreed-to practice for pricing proposals or accumulating and reporting contract performance cost data.

(c) Check the appropriate box below:

- (1) Certificate of Concurrent Submission of Disclosure Statement.
The offeror hereby certifies that, as a part of the offer, copies of the Disclosure Statement have been submitted as follows: (i) original and one copy to the cognizant Administrative Contracting Officer (ACO) or cognizant Federal agency official authorized to act in that capacity, as applicable, and (ii) one copy to the cognizant Federal auditor.

(Disclosure must be on Form No. CASB DS-1 or CASB DS-2, as applicable. Forms may be obtained from the cognizant ACO or Federal official and/or from the loose-leaf version of the Federal Acquisition Regulation.)

Date of Disclosure Statement: _____

Name and Address of Cognizant
ACO or Federal official where filed:

The offeror further certifies that practices used in estimating costs in pricing this proposal are consistent with the cost accounting practices disclosed in the Disclosure Statement.

[] (2) Certificate of Previously Submitted Disclosure Statement.

The offeror hereby certifies that the required Disclosure Statement was filed as follows:

Date of Disclosure Statement: _____

Name and Address of Cognizant
ACO or Federal official where filed:

The offeror further certifies that the practices used in estimating costs in pricing this proposal are consistent with the cost accounting practices disclosed in the applicable Disclosure Statement.

[] (3) Certificate of Monetary Exemption.

The offeror hereby certifies that the offeror together with all divisions, subsidiaries, and affiliates under common control, did not receive net awards of negotiated prime contracts and subcontracts subject to CAS totaling more than \$25 million in the cost accounting period immediately preceding the period in which this proposal was submitted. The offeror further certifies that if such status changes before an award resulting from this proposal, the offeror will advise the Contracting Officer immediately.

[] (4) Certificate of Interim Exemption.

The offeror hereby certifies that (i) the offeror first exceeded the monetary exemption for disclosure, as defined in (3) of this subsection, in the cost accounting period immediately preceding the period in which this offer was submitted and (ii) in accordance with 48 CFR, Subpart 9903.202-1, the offeror is not yet required to submit a Disclosure Statement. The offeror further certifies that if an award resulting from this proposal has not been made within 90 days after the end of that period, the offeror will immediately submit a review certificate to the Contracting Officer, in the form specified under subparagraph (c)(1) or (c)(2) of Part I of this provision, as appropriate, to verify submission of a completed Disclosure Statement.

Caution: Offerors currently required to disclose because they were awarded a CAS-covered prime contract or subcontract of \$25 million or more in the current cost accounting period may not claim this exemption (4). Further, the exemption applies only in connection with proposals submitted before expiration of the 90-day period following the cost accounting period in which the monetary exemption was exceeded.

II. Cost Accounting Standards - Eligibility for Modified Contract Coverage

If the offeror is eligible to use the modified provisions of 48 CFR, Subpart 9903.201-2(b) and elects to do so, the offeror shall indicate by checking the box below. Checking the box below shall mean that the resultant contract is subject to the Disclosure and Consistency of Cost Accounting Practices clause in lieu of the Cost Accounting Standards clause.

- The offeror hereby claims an exemption from the Cost Accounting Standards clause under the provisions of 48 CFR, Subpart 9903.201-2(b) and certifies that the offeror is eligible for use of the Disclosure and Consistency of Cost Accounting Practices clause because during the cost accounting period immediately preceding the period in which this proposal was submitted, the offeror received less than \$25 million in awards of CAS-covered prime contracts and subcontracts or the offeror did not receive a single CAS-covered award exceeding \$1 million. The offeror further certifies that if such status changes before an award resulting from this proposal, the offeror will advise the Contracting Officer immediately.

Caution: An offeror may not claim the above eligibility for modified contract coverage if this proposal is expected to result in the award of a CAS-covered contract of \$25 million or more or if, during its current cost accounting period, the offeror has been awarded a single CAS-covered prime contract or subcontract of \$25 million or more.

III. Additional Cost Accounting Standards Applicable to Existing Contracts

The offeror shall indicate below whether award of the contemplated contract would, in accordance with subparagraph (a)(3) of the Cost Accounting Standards clause, require a change in established cost accounting practices affecting existing contracts and subcontracts.

Yes No

(End of Provision)

ALTERNATE I (APR 1996)

- (5) Certificate of Disclosure Statement Due Date by Educational Institution.

If the offeror is an educational institution that, under the transition provisions of 48 CFR 9903.202-1(f), is or will be required to submit a Disclosure Statement after receipt of this award, the offeror hereby certifies that (check one and complete):

(a) A Disclosure Statement filing Due Date of _____ has been established with the cognizant Federal agency.

(b) The Disclosure Statement will be submitted within the six month period ending _____ months after receipt of this award.

Name and Address of cognizant ACO or Federal Official where Disclosure Statement is to be filed:

(END OF ALTERNATE I)

K.5. CERTIFICATE OF CURRENT COST OR PRICING DATA
(FAR 15.406-2)

CERTIFICATE OF CURRENT COST OR PRICING DATA

When cost or pricing data are required, the contracting officer shall require the contractor to execute a Certificate of Current Cost or Pricing Data using the format in this paragraph, and shall include the executed certificate in the contract file.

This is to certify that, to the best of my knowledge and belief, the cost or pricing data (as defined in Section 15.401 of the Federal Acquisition Regulation(FAR) and required under FAR subsection 15.403-4) submitted, either actually or by specific identification, in writing, to the contracting officer or the contracting officer's representative in support of _____* are accurate, complete, and current as of _____**.

This certification includes the cost or pricing data supporting any advance agreements and forward pricing rate agreements between the offeror and the Government that are part of the proposal.

FIRM

NAME _____ Signature

TITLE

DATE OF EXECUTION***

* Identify the proposal, request for price adjustment, or other submission involved, giving the appropriate identifying number (e.g., Request for Proposal number).

** Insert the day, month, and year when price negotiations were concluded and price agreement was reached or, if applicable, an earlier date agreed upon between the parties that is as close as practicable to the date of agreement on price.

*** Insert the day, month, and year of signing, which should be as close as practicable to the date when the price negotiations were concluded and the contract price agreed to.

End of Certificate

K.6. ENVIRONMENTAL TOBACCO SMOKE

The Public Health Service strongly encourages all grant and contract recipients to provide a smoke-free workplace and to promote the nonuse of all tobacco products. In addition, Public Law 103-227, the Pro-Children Act of 1994, prohibits smoking in certain facilities (or in some cases, any portion of a facility) in which regular or routine education, library, day care, health care or early childhood development services are provided to children.

CERTIFICATION REGARDING ENVIRONMENTAL TOBACCO SMOKE

Public Law 103-227, also known as the Pro-Children Act of 1994 (Act), requires that smoking not be permitted in any portion of any indoor facility owned or leased or contracted for by an entity and used routinely or regularly for the provision of health, day care, early childhood development services, education or library services to children under the age of 18, if the services are funded by Federal programs either directly or through State or local governments, by Federal grant, contract, loan, or loan guarantee. The law also applies to children's services that are provided in indoor facilities that are constructed, operated, or maintained with such federal funds. The law does not apply to children's services provided in private residences; portions of facilities used for inpatient drug or alcohol treatment; service providers whose sole source of applicable Federal funds is Medicare or Medicaid; or facilities where WIC coupons are redeemed. Failure to comply with the provisions of the law may result in the imposition of a civil monetary penalty of up to \$1000 for each violation and/or the imposition of an administrative compliance order on the responsible entity.

By signing this certification, the offeror/contractor certifies that the submitted organization will comply with the requirements of the Act and will not allow smoking within any portion of any indoor facility used for the provision of services for children as defined by the Act.

The submitting organization agrees that it will require that the language of this certification be included in any subawards which contain provisions for children's services and that all subrecipients shall certify accordingly.

Organization: _____

Signature _____ Title _____

Date _____

K.7 Certification of Filing and Payment of Federal Taxes

As prescribed in 304.1202, "Solicitation Provision," insert the following provision. If the solicitation is a Request for Quotations, the term "Quoter" may be substituted for "Offeror."

Certification of Filing and Payment of Federal Taxes (March 2008)

(a) The offeror certifies that, to the best of its knowledge and belief:

- 1) It has filed all Federal tax returns required during the three years preceding this certification;
- 2) It has not been convicted of a criminal offense under the Internal Revenue Code of 1986; and
- 3) It has not been notified of any unpaid Federal tax assessment for which the liability remains unsatisfied, unless the assessment is the subject of an installment agreement or offer in compromise that has been approved by the Internal Revenue Service and is not in default, or the assessment is the subject of a non-frivolous administrative or judicial proceeding.

(b) The signature of the offer is considered to be a certification by the offeror under this provision.

Name of Offeror

Signature of authorized individual

SECTION L - INSTRUCTIONS, CONDITIONS AND NOTICES TO OFFERORS

L.1 SOLICITATION PROVISIONS INCORPORATED BY REFERENCE (FEB 1998) (FAR 52.252-1)

This solicitation incorporates the following solicitation provisions by reference, with the same force and effect as if they were given in full text. The full text of a clause may be assessed electronically at this address: <http://www.arnet.gov/far/>.

- a. Federal Acquisition Regulation (FAR) (48 CFR Chapter 1) Solicitation Provisions
 - (1) 52.215-16 Facilities Capital Cost of Money (OCT 1997)
 - (2) 52.215-20 Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data (OCT 1997)

L.2 DATA UNIVERSAL NUMBERING (DUNS) (OCT 2003) (FAR 52.204-6)

- (a) The offeror shall enter, in the block with its name and address on the cover page of its offer, the annotation "DUNS" or "DUNS+4" followed by the DUNS number or "DUNS+4" that identifies the offeror's name and address exactly as stated in the offer. The DUNS number is a nine-digit number assigned by Dun and Bradstreet Information Services. The DUNS+4 is the DUNS number plus a 4-character suffix that may be assigned at the discretion of the offeror to establish additional CCR records for identifying alternative Electronic Funds Transfer (EFT) accounts (see Subpart 32.11) for the same parent concern.
- (b) If the offeror does not have a DUNS number, it should contact Dun and Bradstreet directly to obtain one.
 - (1) An offeror may obtain a DUNS number—
 - (i) If located within the United States, by calling Dun and Bradstreet at 1-866-705-5711 or via the Internet at <http://www.dnb.com>; or
 - (ii) If located outside the United States, by contacting the local Dun and Bradstreet office.
 - (2) The offeror should be prepared to provide the following information:
 - (i) Company legal business name.
 - (ii) Tradestyle, doing business, or other name by which your entity is commonly recognized.
 - (iii) Company physical street address, city, state and Zip Code.
 - (iv) Company mailing address, city, state and Zip Code (if separate from physical).
 - (v) Company telephone number.
 - (vi) Date the company was started.
 - (vii) Number of employees at your location.

- (viii) Chief executive officer/ key manager.
- (ix) Line of business (industry)
- (X) Company Headquarters name and address (reporting relationship within your entity).

(End of provision)

**L.3 INSTRUCTIONS TO OFFERORS - COMPETITIVE ACQUISITION (MAY 2001)
ALTERNATE I (JAN 2004)(FAR 52.215-1)**

- (a) Definitions. As used in this provision –

“Discussions” are negotiations that occur after establishment of the competitive range that may, at the Contracting Officer’s discretion, result in the offeror being allowed to revise its proposal.

“In writing,” “writing,” or “written” means any worded or numbered expression that can be read, reproduced, and later communicated, and includes electronically transmitted and stored information.

“Proposal modification” is a change made to a proposal before the solicitation’s closing date and time, or made in response to an amendment, or made to correct a mistake at any time before award.

“Proposal revision” is a change to a proposal made after the solicitation closing date, at the request of or as allowed by a Contracting Officer as the result of negotiations.

“Time,” if stated as a number of days, is calculated using calendar days, unless otherwise specified, and will include Saturdays, Sundays, and legal holidays. However, if the last day falls on a Saturday, Sunday or legal holiday, then the period shall include the next working day.

- (b) Amendments to solicitations. If this solicitation is amended, all terms and conditions that are not amended remain unchanged. Offerors shall acknowledge receipt of any amendment to this solicitation by the date and time specified in the amendment(s).
- (c) Submission, modification, revision, and withdrawal of proposals.
- (1) Unless other methods (e.g., electronic commerce or facsimile) are permitted in the solicitation, proposals and modifications to proposals shall be submitted in paper media in sealed envelopes or packages (i) addressed to the office specified in the solicitation, and (ii) showing the time and date specified for receipt, the solicitation number, and the name and address of the offeror. Offerors using commercial carriers should ensure that the proposal is marked on the outermost wrapper with the information in paragraphs (c)(1)(i) and (c)(1)(ii) of this provision.
 - (2) The first page of the proposal must show—

- (i) The solicitation number;
 - (ii) The name, address, and telephone and facsimile numbers of the offeror (and electronic address if available);
 - (iii) A statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation and agreement to furnish any or all items upon which prices are offered at the price set opposite each item;
 - (iv) Names, titles, and telephone and facsimile numbers (and electronic addresses if available) of persons authorized to negotiate on the offeror's behalf with the Government in connection with this solicitation; and
 - (v) Name, title, and signature of person authorized to sign the proposal. Proposals signed by an agent shall be accompanied by evidence of that agent's authority, unless that evidence has been previously furnished to the issuing office.
- (3) Submissions, modification, revision, and withdrawal of proposals.
- (i) Offerors are responsible for submitting proposals, and any modification or revisions, so as to reach the Government office designated in the solicitation by the time specified in the solicitation. If no time is specified in the solicitation, the time for receipt is 4:30 p.m., local time, for the designated Government office on the date that proposal or revision is due.
 - (ii) (A) Any proposal, modification, or revision received at the Government office designated in the solicitation after the exact time specified for receipt of offers is "late" and will not be considered unless it is received before award is made, the Contracting Officer determines that accepting the late offer would not unduly delay the acquisition; and -
 - (1) If it was transmitted through an electronic commerce method authorized by the solicitation, it was received at the initial point of entry to the Government infrastructure not later than 5:00 p.m. one working day prior to the date specified for receipt of proposals; or
 - (2) There is acceptable evidence to establish that it was received at the Government installation designated for receipt of offers and was under the Government's control prior to the time set for receipt of offers; or

(3) It is the only proposal received.

(B) However, a late modification of an otherwise successful proposal that makes its terms more favorable to the Government, will be considered at any time it is received and may be accepted.

(iii) Acceptable evidence to establish the time of receipt at the Government installation includes the time/date stamp of that installation on the proposal wrapper, other documentary evidence of receipt maintained by the installation, or oral testimony or statements of Government personnel.

(iv) If an emergency or unanticipated event interrupts normal Government processes so that proposals cannot be received at the office designated for receipt of proposals by the exact time specified in the solicitation, and urgent Government requirements preclude amendment of the solicitation, the time specified for receipt of proposals will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal Government processes resume.

(v) Proposals may be withdrawn by written notice received at any time before award. Oral proposals in response to oral solicitations may be withdrawn orally. If the solicitation authorizes facsimile proposals, proposals may be withdrawn via facsimile received at any time before award, subject to the conditions specified in the provision at 52.215-5, "Facsimile Proposals." Proposals may be withdrawn in person by an offeror or an authorized representative, if the representative's identity is made known and the representative signs a receipt for the proposal before award.

(4) Unless otherwise specified in the solicitation, the offeror may propose to provide any item or combination of items.

(5) Offerors shall submit proposals submitted in response to this solicitation in English, unless otherwise permitted by the solicitation, and in U.S. dollars, unless the provision at FAR 52.225-17, Evaluation of Foreign Currency Offers, is included in the solicitation.

(6) Offerors may submit modifications to their proposals at any time before the solicitation closing date and time, and may submit modifications in

response to an amendment, or to correct a mistake at any time before award.

- (7) Offers may submit revised proposals only if requested or allowed by the Contracting Officer.
 - (8) Proposals may be withdrawn at any time before award. Withdrawals are effective upon receipt of notice by the Contracting Officer.
- (d) Offer expiration date. Proposals in response to this solicitation will be valid for the number of days specified on the solicitation cover sheet (unless a different period is proposed by the offeror).
- (e) Restriction on disclosure and use of data. Offerors that include in their proposals data that they do not want disclosed to the public for any purpose, or used by the Government except for evaluation purposes, shall —
- (1) Mark the title page with the following legend:

“This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed—in whole or in part—for any purpose other than to evaluate this proposal.” If, however, a contract is awarded to this offeror as a result of—or in connection with—the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government’s right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets [insert numbers or other identification of sheets]; and
 - (2) Mark each sheet of data it wishes to restrict with the following legend:

“Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal.”
- (f) Contract award.
- (1) The Government intends to award a contract or contracts resulting from this solicitation to the responsible offeror(s) whose proposal(s) represents the best value after evaluation in accordance with the factors and subfactors in the solicitation.
 - (2) The Government may reject any or all proposals if such action is in the Government’s interest.
 - (3) The Government may waive informalities and minor irregularities in proposals received.

- (4) The Government intends to evaluate proposals and award a contract after conducting discussions with offerors whose proposals have been determined to be within the competitive range. If the Contracting Officer determines that the number of proposals that would otherwise be in the competitive range exceeds the number at which an efficient competition can be conducted, the Contracting Officer may limit the number of proposals in the competitive range to the greatest number that will permit an efficient competition among the most highly rated proposals. Therefore, the offeror's initial proposal should contain the offeror's best terms from a price and technical standpoint.
- (5) The Government reserves the right to make an award on any item for a quantity less than the quantity offered, at the unit cost or prices offered, unless the offeror specifies otherwise in the proposal.
- (6) The Government reserves the right to make multiple awards if, after considering the additional administrative costs, it is in the Government's best interest to do so.
- (7) Exchanges with offerors after receipt of a proposal do not constitute a rejection or counteroffer by the Government.
- (8) The Government may determine that a proposal is unacceptable if the prices proposed are materially unbalanced between line items or subline items. Unbalanced pricing exists when, despite an acceptable total evaluated price, the price of one or more contract line items is significantly overstated or understated as indicated by the application of cost or price analysis techniques. A proposal may be rejected if the Contracting Officer determines that the lack of balance poses an unacceptable risk to the Government.
- (9) If a cost realism analysis is performed, cost realism may be considered by the source selection authority in evaluating performance or schedule risk.
- (10) A written award or acceptance of proposal mailed or otherwise furnished to the successful offeror within the time specified in the proposal shall result in a binding contract without further action by either party.
- (11) If a post-award debriefing is given to requesting offerors, the Government shall disclose the following information, if applicable:
 - (i) The agency's evaluation of the significant weak or deficient factors in the debriefed offeror's offer.

- (ii) The overall evaluated cost or price and technical rating of the successful and the debriefed offeror and past performance information on the debriefed offeror.
- (iii) The overall ranking of all offerors, when any ranking was developed by the agency during source selection
- (iv) A summary of the rationale for award
- (v) For acquisitions of commercial items, the make and model of the item to be delivered by the successful offeror.
- (vi) Reasonable responses to relevant questions posed by the debriefed offerors as to whether source-selection procedures set forth in the solicitation, applicable regulations, and other applicable authorities were followed by the agency.

(End of provision)

L.4 TYPE OF CONTRACT (APRIL 1984) (FAR 52.216-1)

The Government contemplates award of a cost reimbursement performance-based type contract resulting from this solicitation.

It is anticipated that one (1) contract award will be made from this solicitation and that the award is estimated to be made effective April 15, 2009.

L.5 SINGLE OR MULTIPLE AWARDS (OCT 1995)(FAR 52.216-27)

The Government may elect to award a single contract or to award multiple contracts for the same or similar supplies or services to two or more sources under this solicitation.

L.6 SERVICE OF PROTEST (AUG 1996)(FAR 52.233-2)

- (a) Protests, as defined in Section 33.101 of the Federal Acquisition Regulation, that are filed directly with an agency, and copies of any protests that are filed with the General Accounting Office (GAO) shall be served on the Contracting Officer (addressed as follows) by obtaining written and dated acknowledgment of receipt from:

Director, Division of Contracts Management
 Agency for Healthcare Research and Quality
 540 Gaither Road
 Rockville, Maryland 20850

- (b) The copy of any protest shall be received in the office designated above within one day of filing a protest with the GAO.

L.7 POINT OF CONTACT FOR TECHNICAL INQUIRIES

The technical contact for additional information and answering inquiries is the Contracting Officer. All questions regarding this solicitation shall be in writing and received by the Contracting Officer no later than 12:00 noon EST **January 7, 2009**. All questions should be e-mailed to Jessica Alderton at Jessica.Alderton@ahrq.hhs.gov. The subject line should be marked "Proposal Questions RFP No. AHRQ-09-10008."

L.8 PROPOSAL INTENT/ APPROVAL FOR CONTACT INFORMATION FOR BIDDERS LIST (Attachment 2)

It is requested that if an offeror intends to submit a proposal to this solicitation that the attached Proposal Intent Form be completed and returned to the address indicated by the date indicated. The submission of the intent form is not binding on an offeror to submit a proposal, nor does the failure to submit the form prohibit an offeror from submitting a proposal. The purpose is to provide us with an estimated number of proposals to assist us in our planning and logistics for proposal reviews.

We have added a request to include your contact information to a bidders list. The bidders list will be provided to interested offerors for subcontracting opportunities, as part of an amendment to the solicitation. In order for AHRQ to include your contact information on the bidders list, you must return the Proposal Intent Form and check the box that grants permission to add your name no later than the date listed above.

L.9 GENERAL INSTRUCTIONS

Introduction

The following instructions will establish the acceptable minimum requirements for the format and contents of proposals.

a. Contract Type and General Provisions: It is contemplated that a cost-reimbursement performance based contract will be awarded. In addition to the special provisions of this request for proposal (RFP), any resultant contract shall include the general clauses applicable to the selected offeror's organization and type of contract awarded. Any additional clauses required by Public Law, Executive Order, or procurement regulations, in effect at the time of execution of the proposed contract, will be included.

b. Authorized Official and Submission of Proposal: The proposal shall be signed by an official authorized to bind your (the offeror's) organization. Your proposal shall be submitted in the number of copies, to the address, and marked as indicated in the cover letter of this solicitation. Proposals will be typewritten, reproduced on letter sized paper and will be legible in all required copies.

c. Separation of Technical, Past Performance Information, and Business Proposal: The proposal shall be in 4 separate parts. To expedite the proposal evaluation, all documents required for responding to the RFP should be placed in the following order:

- I. TECHNICAL PROPOSAL: See Technical Proposal Instructions for recommended format (L.10). Please mark as original or copy.
- II. PAST PERFORMANCE INFORMATION: See Past Performance Information Instructions for format (L.11)
- III. BUSINESS PROPOSAL: See Business Proposal Instructions for recommended format (L.13).
- IV. SMALL DISADVANTAGED BUSINESS PARTICIPATION PLAN
See Small Disadvantaged Business Participation Plan Instructions for recommended format (L.12).

Each of the parts shall be separate and complete in itself so that evaluation of one may be accomplished independently of, and concurrently with, evaluation of the other.

- d. Evaluation of Proposals: The Government will evaluate technical proposals in accordance with the criteria set forth in Section M, Evaluation/Award Criteria.
- e. Rejection of Proposals: The Government reserves the right to reject any or all proposals received. It is understood that your proposal will become part of the official contract file.
- f. Unnecessarily Elaborate Proposals: Unnecessarily elaborate brochures or other presentations beyond those sufficient to present a complete and effective proposal are not desired and may be construed as an indication of the offeror's lack of cost consciousness. Elaborate art work, expensive visual and other presentation aids are neither necessary nor wanted.
- g. Privacy Act: The Privacy Act of 1974 (Public Law (P.L.) 93-579) requires that a Federal agency advise each individual whom it asks to supply information: 1) the authority which authorized the solicitation; 2) whether disclosure is voluntary or mandatory; (3) the principal purpose or purposes for which the information is intended to be used; (4) the uses outside the agency which may be made of the information; and 4) the effects on the individual, if any, of not providing all or any part of the requested information.

Therefore:

- (1) The Government is requesting the information called for in this RFP pursuant to the authority provided by Section 301(g) of the Public Health Service Act, as amended, and P.L. 92-218, as amended.
- (2) Provisions of the information requested are entirely voluntary.

- (3) The collection of this information is for the purpose of conducting an accurate, fair, and adequate review prior to a discussion as to whether to award a contract.
- (4) Failure to provide any or all of the requested information may result in a less than adequate review.
- (5) The information provided by you may be routinely disclosed for the following purposes:
 - to the cognizant audit agency and the Government Accountability Office (GAO) for auditing;
 - to the Department of Justice as required for litigation;
 - to respond to Congressional inquiries; and
 - to qualified experts, not within the definition of Department employees for opinions as a part of the review process.

In addition, the Privacy Act of 1974 (P.L. 93-579, Section 7) requires that the following information be provided when individuals are requested to disclose their social security number.

Provision of the social security number is voluntary. Social security numbers are requested for the purpose of accurate and efficient identification, referral, review and management of AHRQ contracting programs. Authority for requesting this information is provided by Section 305 and Title IV of the Public Health Service Act, as amended.

- h. The RFP does not commit the Government to pay any cost for the preparation and submission of a proposal. 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 or any acquisition action.

The Government reserves the right to award a contract without discussions if the Contracting Officer determines that the initial prices are fair and reasonable and that discussions are not necessary.

L.10 TECHNICAL PROPOSAL INSTRUCTIONS

The technical proposal shall contain an original and nine (9) copies. The technical proposal described below shall be limited to **100 pages** not including biographic sketches, with no less than a 11 point font, double-spaced (lists of deliverables, person loading charts, and similar materials need not be double-spaced, so long as they are legible). Brief biographic sketches or CVs (less than ten pages in length) providing the relevant qualifications necessary for this effort are only required for key personnel. The technical proposal shall not contain reference to cost; however resources information, such as data concerning labor hours and categories, labor mix, materials, subcontracts, etc., shall be contained in the technical proposal so that your understanding of the Statement of Work (SOW) may be evaluated. It must disclose your technical approach in as much detail as possible, including, but not limited to, the requirements of these

instructions. Lengthy proposals and voluminous appendices are neither needed nor desired as they are difficult to read and evaluate and may indicate the offeror's inability to concisely state their proposal. Appendices are to be provided electronically in MS Office format on CD, in the same quantity as the technical proposal.

a. Recommended Technical Proposal Format

The offeror's proposal should present sufficient information to reflect a thorough understanding of the work requirements and a detailed plan for achieving the objectives of the scope of work. Technical proposals shall not merely paraphrase the requirements of the Agency's scope of work or parts thereof, or use of phrases such as "will comply" or "standard techniques will be employed." The technical proposal must include a detailed description of the techniques and procedures to be used in achieving the proposed end results in compliance with the requirements of the Agency's scope of work.

- (1) Cover Page: The name of the proposing organization, author(s) of the technical proposal, the RFP number and the title of the RFP should appear on the cover. The cover page must also include the DUNS and TIN as well as a point of contact and contact information. One (1) manually signed original copy of the proposal and the number of copies specified in the RFP cover letter are required.
- (2) Table of Contents: Provide sufficient detail so that all important elements of the proposal can be located readily.
- (3) Introduction: This should be a one or two page summary outlining the proposed work, your interest in submitting a proposal, and the importance of this effort in relation to your overall operation.
- (4) Technical Discussion: The offeror shall prepare a technical discussion which addresses evaluation criteria A, B, C & D below (including their subcriteria). The offeror shall further state that no deviations or exceptions to the Statement of Work (SOW) are taken. The evaluation criteria (and their respective subcriteria) are as follows:

Technical proposals submitted in response to this RFP shall address each of the items described below, and shall be organized in the same manner and within the page limitations specified. Proposals shall be prepared in double-spaced format, with numbered pages.

A. Technical Approach

1. The Offeror shall submit a narrative which clearly addresses how he or she plans to develop, design, and implement the Statement of Work within the time constraints of the project.

2. The Offeror shall address the technical approach proposed for each of the 5 tasks required by the Statement of Work. The 5 tasks are: 1) undertake administrative and planning activities; 2) maintain and update private Web site for CVEs; 3) convene Webinar series, approximately 2-3 per month; 4) convene 2 in-person meetings per year for roughly 175 persons each; and 5) convene workgroup on standard public report elements.

3. The Offeror shall develop and present an agenda for: 1) a hypothetical Webinar on “resource use measures and applications for CVEs”; 2) a hypothetical conference session designed to provide CVEs with CVE networking opportunities; and 3) a hypothetical conference session to provide technical assistance on “aligning a specific quality improvement strategy across-organizations, e.g., hospitals, within a community.”

4. The Offeror also shall discuss the technical approach for the 4 unpriced options identified in the Statement of Work.

5. The Offeror shall discuss geographic proximity of its office (or satellite office) vis a vis the Agency’s office.

B. Organizational Qualifications and Experience

It is essential that the Offeror demonstrate the technical ability and subject matter expertise to design and conduct the various activities identified in the Statement of Work. Offeror shall describe organizational structure and capabilities that will ensure project needs are met. Specifically, Offeror shall:

1. Demonstrate organization’s past experience with Federal contract(s).
2. Demonstrate organization’s experience in managing distance learning programs, ie, Webinar and Web site-based learning, large technical conferences of a similar size and nature, and topic-specific, time-limited workgroup.

C. Management and Staffing Plan

The Offeror shall demonstrate the ability to manage work and personnel resources in a timely manner to meet this project’s needs. Specifically, Offeror shall:

1. Address labor skill mix determination, delineation of staff and subcontractor responsibilities, lines of authority.
2. Present a personnel selection justification.
3. Demonstrate that no less than 50% of Project Director’s time is dedicated to this project.
4. Provide a signed agreement, eg, a letter of commitment, between the Offeror and any personnel other than current direct employees that includes dates of employment and specific tasks to be performed.

5. Describe system for quality control of work performed including documents to be produced, and proposed system for management control and contract provision compliance.
6. Describe how Offeror would minimize or avoid the following management problems (and other problems) that may arise:
 - a. Contract staffed by too many people, resulting in silos of information with burden on Agency to become defacto day-to-day manager of team and resulting in confusion among CVEs who are being contacted by too many different contractor staff;
 - b. Inappropriate assignment of high-level tasks to junior staff (ie, with little/no expertise in relevant subject matter) making the task of translating nuanced comments from CVEs difficult; and,
 - c. Contract team being used to a particular routine such that a change by Agency (eg, different format for Webinar, etc.) proves difficult to implement.

D. Key Personnel - Project Director

Offeror shall demonstrate, describe or provide the Project Director's:

1. Specific expertise in these two fundamental focus areas: 1) Data Aggregation and Quality and Efficiency Measurement; and 2) Public Reporting on Quality and Efficiency.
2. Familiarity with any of the remaining six focus areas: 1) Collaborative Leadership and Sustainability; 2) Public at-large Engagement; 3) Provider Incentives for Quality; 4) Consumer Incentives for Quality; 5) Cross-organizational Capacity for Improving Quality; and 6) Health Information Technology.
3. Experience with and ability to:
 - 1) Manage a distance learning program with Web site and Webinar components
 - 2) Plan and implement meetings for 150-200 persons
 - 3) Successfully, simultaneously juggle multiple, complex tasks, without losing site of the big picture or of planning details
 - 4) Maintain flexibility, i.e., to quickly regroup in order to address emerging collaborative issue or respond to Agency or collaboratives' imperatives
 - 5) Identify and access seasoned professionals with extensive knowledge of evidence base and best practices across the 8 focus areas
 - 6) Review and critique technical documents (including slide presentations) to ensure they conform to evidence base
 - 7) Summarize essence of technical material such that it is readily understandable by lay audience
 - 8) Understand research such rigorous findings can be discerned from less rigorous findings
 - 9) Use a range of communication venues and management techniques to lead a successful and dynamic Learning Network
 - 10) Evaluate program success on an ongoing basis, and continuously improve.

4. Evidence of qualifications and formal education, which should include at a minimum relevant graduate-level training, e.g., in field of medicine and/or public health, and 10 years' experience managing projects of similar size and nature.

L.11 PAST PERFORMANCE INFORMATION

Offerors shall submit the following information (original and 3 copies) as part of their proposal for both the offeror and proposed major subcontractors:

(1) A list of the last five (5) contracts and subcontracts completed (most relevant or most related) during the past three years and all contracts and subcontracts currently in process. Reference contracts and subcontracts completed during the past three years and include recently completed and ongoing work directly related to the requirements of this acquisition. Contracts listed may include those entered into by the Federal Government, agencies of State and local governments and commercial customers. Offerors that are newly formed entities without prior contracts should list contracts and subcontracts as required for all key personnel. Include the following information for each contract and subcontract:

- a: Name of contracting activity
- b: Contract number
- c: Contract type
- d: Total contract value
- e: Contract work
- f: Contracting Officer and telephone number
- g: Program Manager and telephone number
- h: Administrative Contracting Officer, if different from item f, and telephone number
- i: List of major subcontracts

(2) The offeror should provide information on problems encountered on the contracts and subcontracts identified in (1) above and corrective actions taken to resolve those problems. Offerors should not provide general information on their performance on the identified contracts. General performance information will be obtained from the references.

(3) The offeror may describe any quality awards or certifications that may indicate the offeror possesses a high-quality process for developing and producing the product or service required. Identify what segment of the company (one division or the entire company) that received the award or certification. Describe when the award or certification was bestowed. If the award or certification is over three years old, present evidence that the qualifications still apply.

(4) Each offeror will be evaluated on his/her performance under existing and prior contracts for similar products or services. Performance information will be used for both responsibility determinations and as an evaluation factor against which offeror's relative rankings will be compared to assure best value to the Government. The Government will focus on information that demonstrates quality of performance relative to the size and complexity of the procurement under consideration. References other than those identified by the offeror may

be contacted by the Government with the information received used in the evaluation of the offeror's past performance.

(5) The offeror must provide related past performance of the proposed Project Director. Reference contracts and subcontracts completed during the past three years and include recently completed and ongoing work directly related to the requirements of this acquisition.

The attached Past Performance Questionnaire and Contractor Performance Form shall be completed by those organizations listed in (1) above. The evaluation forms shall be completed and forwarded directly to:

Jessica Alderton
Agency for Healthcare Research and Quality
Division of Contracts Management
540 Gaither Road
Rockville, Maryland 20850
FAX: 301-427-1740

Evaluation forms must be received by the date and time listed in order to be included in the review process. It is the responsibility of the offeror to ensure that these documents are forwarded to the Contracting Officer.

L.12 SMALL DISADVANTAGED BUSINESS PARTICIPATION PLAN:

In accordance with FAR Part 15.304(c)4, the extent of participation of Small Disadvantaged Business (SDB) concerns in performance of the contract shall be evaluated in unrestricted acquisitions expected to exceed a total estimated cost of \$550,000 (\$1,000,000 for construction) subject to certain limitations (see FAR 19.201 and 19.1202).

A. All offerors, regardless of size, shall submit the following information in original and 2 copies.

A plan on the extent of participation of Small Disadvantaged Business concerns in performance of the contract. Participation in performance of the contract includes the work expected to be performed by SDB concern(s). This can include SDB (as prime contractor), joint ventures, teaming arrangements, and subcontracts. Include the following information in SDB participation plans:

1. The extent of an offeror's commitment to use SDB concerns. Commitment should be as specific as possible, i.e., are subcontract arrangements already in place, letters of commitment, etc. Enforceable commitments will be weighted more heavily than non-enforceable ones.
2. Specifically identify the SDB concerns with point of contact and phone number.
3. The complexity and variety of the work SDB concerns are to perform.

4. Realism for the use of SDB in the proposal.
5. Past performance of the Offeror in complying with subcontracting plans for SDB concerns.
6. Targets expressed as dollars and percentage of total contract value for each participating SDB; which will be incorporated into and become part of any resulting contract.
7. The extent of participation of SDB concerns in terms of the total acquisition.

B. SDB participation information will be used for both responsibility determinations and as an evaluation factor against which offeror's relative rankings will be compared to assure the best value to the Government. The Government will focus on information that demonstrates realistic commitments to use SDB concerns relative to the size and complexity of the acquisition under consideration. The Government is not required to contact all references provided by the offeror. Also, references other than those identified by the offeror may be contacted by the Government to obtain additional information that will be used in the evaluation of the offeror's commitment to SDB participation.

L.13 BUSINESS PROPOSAL

The offeror shall submit as part of the proposal a separate enclosure titled "Business Proposal." The Business Proposal shall include the Cost/Price Proposal, the Small Business Subcontracting Plan, and Other Administrative Data in accordance with the following:

A. Cost/Price Proposal

A cost proposal shall be submitted in accordance with FAR 15, in a format similar to the attachment. The offeror's own format may be utilized, but all required information in the attachment shall be provided.

The business proposal must contain sufficient information to allow the Government to perform a basic analysis of the proposed cost or price of the work. This information shall include the amounts of the basic elements of the proposed cost or price.

As appropriate, cost breakdowns shall be provided for the following cost elements.

(a) Direct Labor

The estimated cost for all personnel who will be assigned for direct work on this project shall be included. Give the name, title, percent of effort or time, salary and fringe benefits for each employee.

Salary increases that are anticipated during performance of a resultant contract should be proposed as a cost. If escalation is included, state the degree

(percent) and methodology, e.g., annual flat rate applied to a base rate as of a specific date or a mid-pointed rate for the period of performance. State whether any additional direct labor (new hires) will be required during the performance period of this procurement. If so, state the number required and anticipated date of hire. Also, specify the month and day on which your fiscal year commences.

(b) Supplies and Equipment

Include description, unit price, quantity, total price, justification for purchasing or leasing items and the basis for pricing (vendor quotes, invoices prices, etc.).

(c) Travel

The amount proposed for travel shall be supported with a breakdown which includes purposes, destination, duration, and estimated cost (transportation and per diem) for each proposed trip. If travel costs are proposed on the basis of your organization's established travel policy, a copy of the policy must be provided.

(d) Consultants

This element should include name(s) of consultant, number of days, and daily rate. The method of obtaining each consultant, either sole source or competitive, and the degree of competition or the rationale for sole source shall be explained.

(e) Subcontractors

Subcontractor costs shall be broken down and supported by cost and pricing data adequate to establish the reasonableness of the proposed amount. Subcontract cost detail should be similar to the level of detail provided for the prime contractor, with the same cost elements. Support documentation should include degree of subcontract competition and basis for selecting source.

(f) Other Direct Costs

Any proposed other direct costs shall be supported with breakdown outlining the separate costs proposed and details supporting the formulation of the costs proposed. A signed agreement between the offeror and any personnel other than direct employees that includes dates of employment, salary, and specific tasks to be performed should be included.

(g) Indirect Costs

Indicate how you have computed and applied indirect costs, and provide a basis for evaluating the reasonableness of the proposed rates.

B. Cost Analysis

In order for AHRQ to conduct a complete cost analysis please include the following information in the cost proposal:

- Copy of most recent payroll register for ALL proposed employees. If necessary, show proposed hourly rate calculations for each employee.

- Copy of most current indirect cost rate agreement. If no rate agreement exists, show detailed calculations of all proposed indirect rates, supported by audited or reviewed financial statements.
- Detailed breakdown of each proposed direct cost element by contract year (not by task only), showing proposed total quantities per year and corresponding proposed unit costs for each item.
- Supporting documentation for each proposed unit cost. Examples of accepted forms of documentation include invoices, catalog pages, quotations, and general ledgers showing historical costs for comparable items.
- State salary increase policy, as well as proposed increase factor. If it is company policy for employees to receive salary increases on their anniversary dates of hire, please indicate the anniversary dates of hire for each proposed employee.
- Breakdown of proposed unloaded direct labor rates and proposed number of direct labor hours for each employee for each contract year.
- State the proposed period of performance that proposed costs are based upon.

C. Small Business Subcontracting Plan:

All offerors except small businesses are required to submit a subcontracting plan in accordance with the Small Business Subcontracting Plan, FAR 52.219-9, incorporated in this solicitation. A copy of a model subcontracting plan is available at <http://www.hhs.gov/osdbu/read/SampleSubcontractingPlan.doc>. If the model plan is not used, all elements outlined must be addressed in the offeror's format. **If the offeror is not a small business and fails to submit a subcontracting plan with the initial proposal, the offeror will be considered nonresponsive and their proposal will be returned without further consideration.**

This provision does not apply to small business concerns. This provision does apply to all other offerors, including large business concerns, colleges, universities and non-profit organizations.

The term "subcontract" means any agreement (other than one involving an employer-employee relationship) entered into by a Federal Government prime contractor or subcontractor calling for supplies or services required for the performance of the original contract or subcontract. This includes, but is not limited to, agreements/ purchase orders for supplies and services such as equipment purchase, copying services, and travel services.

The offeror understands that:

- a. No contract will be awarded unless and until an acceptable plan is negotiated with the Contracting Officer. The plan will be incorporated in to the contract.

- b. An acceptable plan must, in the determination of the Contracting officer, provide the maximum practicable opportunity for small business concerns and small business concerns owned and controlled by socially and economically disadvantaged persons to participate in the performance of the contract.
- c. If a subcontracting plan acceptable to the Contracting Officer is not negotiated within the time limits prescribed by the contracting activity and such failure arises out of causes within the control and with the fault or negligence of the offeror, the offeror shall be ineligible for award. The Contracting Officer shall notify the Contractor in writing of the reasons for determining a subcontracting plan unacceptable early enough in the negotiation process to allow the Contractor to modify the plan within the time limits prescribed.
- d. Prior compliance of the offeror with other such subcontracting plans under previous contracts will be considered by the Contracting Officer in determining the responsibility of the offeror for award of the contract.
- e. It is the offeror's responsibility to develop a satisfactory subcontracting plan with respect to small business concerns and small business concerns owned and controlled by socially and economically disadvantaged individuals, and women-owned small business concerns, and that each such aspect of the offeror's plan will be judged independent of the other.
- f. The offeror will submit, as required by the Contracting Officer, subcontracting reports in accordance with the instructions thereon, and as further directed by the Contracting Officer. Subcontractors will also submit these reports to the Government Contracting Officer or as otherwise directed, with a copy to the prime Contractor's designated small and disadvantaged business liaison.
- g. For this particular acquisition, the AHRQ recommended goal (as a percentage of total contract value for the base period) is 20% for Small Businesses, which shall include at least 5.5% (as a percentage of total planned subcontract dollars for the base period) for Small Disadvantaged Businesses, at least 5% (as a percentage of total planned subcontract dollars for the base period) for Women-Owned Small Businesses, and at least 3% (as a percentage of total planned subcontract dollars for the base period) for HUBZone Small Businesses and at least 3% (as a percentage of total planned subcontract dollars for the base period) for Veteran-Owned Small Businesses. These goals represent AHRQ's expectations of the minimum level for subcontracting with small business at the prime contract level. Any goal stated less than the AHRQ recommended goal shall be justified and is subject to negotiation.

D. Other Administrative Data

(1) Terms and Conditions: The proposal shall stipulate that it is predicated upon the terms and conditions of the RFP. In addition, it shall contain a statement to the effect that it is firm for a period of at least 120 days from the date of receipt thereof by the Government.

Minimum Bid Acceptance Period (April 1984)

(a) "Acceptance period," as used in this provision, means the number of calendar days available to the Government for awarding a contract from the date specified in this solicitation for receipt of bids.

(b) This provision supersedes any language pertaining to the acceptance period that may appear elsewhere in this solicitation.

(c) The Government requires a minimum acceptance period of 120 days.

(d) A bid allowing less than the Government's minimum acceptance period may be rejected.

(e) The bidder agrees to execute all that it has undertaken to do, in compliance with its bid, if that bid is accepted in writing within (i) the acceptance period stated in paragraph (3) above, or (ii) any longer acceptance period stated in paragraph (4) above.

(2) Authority to Conduct Negotiations: The proposal shall list the names and telephone numbers of persons authorized to conduct negotiations and to execute contracts.

(3) Property:

(a) It is HHS policy that contractors will provide all equipment and facilities necessary for performance of contracts. Exception may be granted to furnish Government-owned property, or to authorize purchase with contract funds, only when approved by the contracting officer. If additional equipment must be acquired, you shall include the description, estimated cost of each item and whether you will furnish such items with your own funds.

(b) You shall identify Government-owned property in your possession and/or property acquired from Federal funds to which you have title, that is proposed to be used in the performance of the prospective contract.

(c) The management and control of any Government property shall be in accordance with HHS Publication (OS) 74-115 entitled, Contractor's Guide for Control of Government Property" 1990, a copy of which will be provided upon request.

(4) Royalties: You shall furnish information concerning royalties which are anticipated to be paid in connection with the performance of work under the proposed contract.

- (5) Commitments: You shall list other commitments with the Government relating to the specified work or services and indicate whether these commitments will or will not interfere with the completion of work and/or services contemplated under this proposal.
- (6) Financial Capacity: You shall provide sufficient data to indicate that you have the necessary financial capacity, working capital, and other resources to perform the contract without assistance from any outside source. If not, indicate the amount required and the anticipated source. (Financial data such as balance sheets, profit and loss statements, cash forecasts, and financial histories of your organization's affiliated concerns should be utilized.)
- (7) Performance Capability: You shall provide acceptable evidence of your "ability to obtain" equipment, facilities, and personnel necessary to perform the requirements of this project. If these are not represented in your current operations, they should normally be supported by commitment or explicit arrangement, which is in existence at the time the contract is to be awarded, for the rental, purchase, or other acquisition of such resources, equipment, facilities, or personnel. In addition, you shall indicate your ability to comply with the required or proposed delivery or performance schedule taking into consideration all existing business commitments, commercial as well as Government.
- (8) Representations and Certifications: Section K, "Representations and Certifications and Other Statements of Offerors" shall be completed and signed by an official authorized to bind your organization. **Section K shall be made a part of the original business proposal.**

L.14 SELECTION OF OFFERORS

- a. The acceptability of the technical portion of each contract proposal will be evaluated by a technical review committee. The committee will evaluate each proposal in strict conformity with the evaluation criteria of the RFP, utilizing point scores and written critiques. The committee may suggest that the Contracting Officer request clarifying information from an offeror.
- b. The business portion of each contract proposal will be subjected to a limited cost review, management analysis, etc.
- c. Past performance of the technically acceptable offerors will be evaluated by AHRQ staff. A competitive range will be determined. The competitive range will consist of those offers which are highly rated, based upon the technical and past performance evaluation. Written discussions will be conducted with all offerors in the competitive range, if necessary. **In addition, offerors within the competitive range may be required to give an oral presentation to AHRQ contracts and program staff. Details on the information the presentation must contain will be provided to those offerors prior to the presentation.** A cost analysis will be performed by AHRQ's Cost Analyst. All aspects of the proposals are subject to discussions, including cost, technical approach, past

performance, and contractual terms and conditions. Final Proposal Revisions may be requested with the reservation of the right to conduct limited negotiations after submission of Final Proposal Revisions.

- d. A final best-value analysis will be performed taking into consideration the results of the technical evaluation, cost analysis, past performance, and ability to complete the work within the Government's required schedule. The Government reserves the right to make an award to the best advantage of the Government, technical merit, cost, past performance, and other factors considered.
- e. The Government reserves the right to make a single award, multiple awards, or no award at all to the RFP.

SECTION M - EVALUATION FACTORS FOR AWARD

TECHNICAL EVALUATION CRITERIA

Selection of an offeror for contract award will be based on an evaluation of proposals against the evaluation criteria and award will be made to that responsible offeror whose proposal is most advantageous to the Government. Evaluation Criteria 1 through 4 will be evaluated by a peer review technical committee that will also recommend technical acceptability or unacceptability of the proposal. Offerors that submit technically acceptable proposals will then be evaluated for past performance and Small Disadvantaged Business Participation Plan. Following these evaluations a competitive range will be determined.

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. While the scientific technical merit of the proposals will receive paramount consideration in the selection of the Contractor for this acquisition, the Government may also consider other factors in source selection.

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. The Government reserves the right to make a single award, multiple awards, or no award at all.

THE GOVERNMENT RESERVES THE RIGHT TO MAKE AN AWARD WITHOUT DISCUSSION OR NEGOTIATIONS.

The Government reserves the right to make an award to the best advantage of the Government. The evaluation factors and assigned weights which will be used in the overall review of the offeror's proposal are outlined below. The technical proposal shall consist of the responses to evaluation criteria 1 through 4 (including subcriteria). The offeror should show that the objectives stated in the proposal are understood and offer a logical program for their achievement. The following criteria will be used to evaluate proposals and will be weighted as indicated in establishing a numerical rating for all proposals submitted. Factors facilitating the evaluation of each criterion below are referenced in the corresponding criteria found in Section L of this solicitation.

OFFERORS PLEASE NOTE: Evaluation Criteria 1 through 4, for a total of 100 points, will be evaluated by a peer review technical committee that will also recommend technical acceptability or unacceptability of the proposal. Program staff and contracting personnel will review and evaluate Criteria 5 and 6 for a total of 50 points. The total possible points for Evaluation Criteria 1 through 6 is 150 points.

Evaluation Criteria

Weight

1. Technical Approach

25

Proposals will be evaluated on the completeness, reasonableness, clarity, and feasibility of:

- the 5 tasks in the Statement of Work

- including the 3 hypothetical event agendas
- the unpriced options in the Statement of Work

The offeror will be evaluated on the required geographic proximity or its satellite office to the AHRQ building.

2. Organizational Qualifications and Experience 10

Proposals shall be evaluated on the organizations demonstration of past experience with Federal contract(s). Proposals shall be evaluated on their experience in managing distance learning programs, ie, Webinar and website-based learning. In addition the offeror will be evaluated on its demonstrated experience in managing technical conferences of a similar size and nature, and workgroup facilitation and planning (as stated in the scope of work).

3. Management and Staffing Plan 15

Proposals will be evaluated on the Offeror's demonstrated ability to manage work and personnel resources to meet this project's needs in a timely manner. The proposal shall demonstrate the Offeror's ability to address labor skill mix determination (including requirement that at least 50% of Project Lead's time is dedicated to this project and the required time on-site at AHRQ); ability to implement a system for quality control of all work to be produced under this project; and, ability to anticipate and address management problems that may arise.

4. Key Personnel – Project Director 50

Proposals will be evaluated as to the extent, relevance and quality of Project Director's expertise and experience in the following 2 focus areas: 1) Data Aggregation and Quality and Efficiency Measurement; and 2) Public Reporting on Quality and Efficiency; and, extent, relevance and quality of the Project Director's familiarity with any of the remaining six focus areas described in the Statement of Work.

The Offeror shall demonstrate the Project Director's experience with and ability to manage a distance learning program, including planning and implementing large meetings, Webinars and maintenance of a Web site; ability to remain flexible to address arising needs; ability to identify experts; ability to review and understand technical text, discern research findings and summarize them for a lay audience; and, ability to use a range of communication and management techniques to lead a successful learning network.

Proposals shall address the requirement that the Project Director possess graduate level training and at least 10 year's experience managing projects similar in size and nature.

TOTAL POINTS BEFORE PAST PERFORMANCE 100

5. Past Performance 45

Offerors will be evaluated on all past performance for the Organization and the Project Director (see Section L.11). Completed questionnaires will also provide a basis for

determining past performance evaluation as well as information obtained from the references listed in the proposal, other customers known to the Government, consumer protection organizations, and any others who may have useful and relevant information. Information will also be considered regarding any significant subcontractors and key personnel records.

The offerors past performance will be evaluated on the basis of the following factors:

- a. Quality**
How well has the offeror conformed to the performance standard in providing the services or achieving the stated objective(s) of contracts or grants? Quality will be evaluated by the personnel provided, the level of effort agreed to in the contract statement of work or grant, quality of final products (e.g., findings, tools), implementation activities, dissemination and activities that promote turning research into action (i.e. promoting uptake of innovation).
- b. Timeliness**
How well has the offeror adhered to timetables and delivery schedules in providing the required services or products? Consideration is given to the offeror's efforts to recommend and/or take corrective actions to keep work on schedule.
- c. Business Relations/ Customer satisfaction**
The offeror will be rated on professional and cooperative behavior with the client.
- d. Cost control**
The offeror will be rated on the ability to set reasonable budgets within contracting or grant guidelines and adhere to them in conducting research.

Assessment of the offeror's past performance will be one means of evaluating the credibility of the offeror's proposal, and relative capability to meet performance requirements.

Evaluation of past performance will often be quite subjective based on consideration of all relevant facts and circumstances. It will not be based on absolute standards of acceptable performance. The Government is seeking to determine whether the offeror has consistently demonstrated a commitment to customer satisfaction and timely delivery of services and quality products at fair and reasonable prices.

The assessment of the offeror's past performance will be used as a means of evaluating the relative capability of the offeror and the other competitors. Thus, an offeror with an exceptional record of past performance may receive a more favorable evaluation than another whose record is acceptable, even though both may have acceptable technical proposals.

By past performance, the Government means the offeror's record of conforming to specifications and to standards of good workmanship; the offeror's record of forecasting and controlling costs; the offeror's adherence to contract schedules, including the administrative aspects of performance; the offeror's reputation for reasonable and cooperative behavior and commitment to customer satisfaction; and generally, the offeror's business-like concern for the interest of the customer.

The Government will consider the number or severity of an offeror's problems, the effectiveness of corrective actions taken, the offeror's overall work record, and the age and relevance of past performance information.

If the offeror or the proposed employees for the offeror, do not have a past performance history relative to this acquisition, or past performance not relative to this acquisition, the offeror will not be evaluated favorably or unfavorably on this factor. A neutral rating will be determined.

The Government reserves the right to evaluate relevant past performance information not specifically provided by the offeror.

In evaluating past performance the Government, will consider the offeror's effectiveness in quality of products or services; timeliness of performance; cost control; business practices; customer satisfaction, and key personnel past performance.

NOTICE: Past Performance questionnaires are to be provided to the Contracts Office NO LATER than the closing date and time for receipt of proposals. It is the offeror's responsibility to ensure that these documents are forwarded to Jessica Alderton by email: jessica.alderton@ahrq.hhs.gov.

6. Small Disadvantaged Business Participation Plan 5

The evaluation will be abased on information obtained from the plan provided by the offeror, the realism of the proposal and other relevant information obtained from the named SDB concerns, and any other information supplies by the offeror concerning problems encountered in SDB participation.

Evaluation of the SDB Participation Plan will be a subjective assessment based on consideration of all relevant facts and circumstances. It will not be based on absolute standards of acceptable performance. The government is seeking to determine whether the offeror has demonstrated a commitment to use SDB concerns for the work that it intends to perform as the prime contractor.

The assessment of the offeror's SDB Participating Plan will be used as a means of evaluating the relative capacity and commitment of the offeror and the other competitors. Thus, an offeror with an exceptional record of participation with SDB concerns may receive more points and a more favorable evaluation than another whose record is acceptable , even though both may have acceptable technical proposals SDB participation will be scored with offerors receiving points from 0 to 5, with 5 being the most favorable. .

TOTAL AVAILABLE POINTS 150

PAST PERFORMANCE QUESTIONNAIRE

PART ONE: INSTRUCTIONS

The offeror listed below has submitted a proposal in response to the Agency for Healthcare Research and Quality (AHRQ) **Solicitation No. AHRQ-09-10008**, entitled "Evidence-based Technical Assistance for Multi-stakeholder, Community-based Quality Collaboratives." Past performance is a very important part of the evaluation criteria for this acquisition, so input from previous customers of the offeror is extremely important. This office would greatly appreciate you taking the time to complete this form. **This information is to be provided to Jessica Alderton, the AHRQ Contracting Officer and is NOT to be disclosed to the offeror either verbally or in writing.** Please provide an honest assessment and return to AHRQ (either by mail, fax or email), no later than **February 17, 2009 by 12 noon EST**. If you have any questions, please contact Jessica Alderton at via e-mail Jessica.Alderton@ahrq.hhs.gov.

Jessica Alderton
Agency for Healthcare Research and Quality
Division of Contracts Management
540 Gaither Road
Rockville, Maryland 20850
FAX: (301) 427-1740

NAME OF OFFEROR: _____

ADDRESS: _____

Contractor Performance Form

1. Name of Contractor: _____
2. Address: _____

3. Contract/Grant Number: _____
4. Contract/Grant Value (Base Plus Options): _____
5. Contract/Grant Award Date: _____
6. Contract/Grant Completion Date: _____
7. Type of Contract/Grant: (Check all that apply) ()FP ()FPI ()FP-EPA
() Award Fee () CPFF-Completion () CPFF-Term () CPIF () CPAF
() IO/IQ () BOA () Requirements () Labor-Hour ()T&M () SBSA
()8(a) ()SBIR () Sealed Bid()Negotiated()Competitive ()Non-Competitive
8. Description of Requirement:

CONTRACTOR'S PERFORMANCE RATING

Ratings: Summarize contractor performance and circle in the column on the right the number which corresponds to the performance rating for each rating category. Please see reverse page for explanation of rating scale.

Quality of Product or Service	Comments	0 1 2 3 4 5
Cost Control	Comments	0 1 2 3 4 5
Timeliness of Performance	Comments	0 1 2 3 4 5
Business Relations	Comments	0 1 2 3 4 5

Customer Satisfaction - Is/was the Contractor committed to customer satisfaction? Yes No ;
 Would you use this Contractor again? Yes No

Reason:

NAME OF EVALUATOR: _____
(Please Print)

TITLE OF EVALUATOR: _____

SIGNATURE OF EVALUATOR: _____

DATE: _____

MAILING ADDRESS: Include name of organization/ federal agency

PHONE #: _____

E-MAIL : _____

Rating Guidelines: Summarize contractor performance in each of the rating areas. Assign each area a rating 0(Unsatisfactory), 1(Poor), 2(Fair), 3(Good), 4(Excellent) 5(Outstanding). Use the following instructions as guidance in making these evaluations.

	Quality	Cost Control	Timeliness of Performance	Business Relation
	-Compliance with contract requirements -Accuracy of reports -Technical excellence	-Within budget(over/under target costs) -Current, accurate, and complete billings -Relationship of negotiated costs to actual -Cost efficiencies -Change orders issue	-Met interim milestones -Reliable -Responsive to technical direction -Completed on time, including wrap-up and contract adm -No liquidated damages assessed	-Effective management -Businesslike correspondence -Responsive to contract requirements -Prompt notification of problems - Reasonable/cooperative -Flexible -Pro-active -Effective small/small disadvantaged business sub-contracting program
0-unsatisfactory	Nonconformances are jeopardizing the achievement of contract requirements, despite use of Agency resources	Ability to manage cost issues is jeopardizing performance of contract requirements, despite use of Agency resources	Delays are jeopardizing the achievement of contract requirements, despite use of Agency's resources	Response to inquiries, technical/service/administrative issues is not effective
1-Poor	Overall compliance requires major Agency resources to ensure achievement of contract requirements	Ability to manage cost issues requires major Agency resources to ensure achievement of contract requirements	Delays require major Agency resources to ensure achievement of contract requirements	Response to inquiries, technical/service/administrative issues is marginally effective

2-Fair	Overall compliance requires minor Agency resources to ensure achievement of contract requirements	Ability to manage cost issues requires minor Agency resources to ensure achievement of contract requirements	Delays require minor Agency resources to ensure achievement of contract requirements	Response to inquiries, technical/service/administrative issues is somewhat effective
3-Good	Overall compliance does not impact achievement of contract requirements	Management of cost issues does not impact achievement of contract requirements	Delays do not impact achievement of contract requirements	Response to inquiries, technical/service/administrative issues is usually effective
4-Excellent	There are no quality problems	There are no cost management issues	There are no delays	Response to inquiries, technical/service/administrative issues is effective

5-Outstanding. The Contractor has demonstrated an outstanding performance level that justifies adding a point to the score. It is expected that this rating will be used in those rare circumstances where Contractor performance clearly exceeds the performance levels described as "Excellent."

PROPOSAL INTENT RESPONSE SHEET

RFP No. AHRQ-09-10008

Please review the attached request for proposal. Furnish the information requested below and return this page by January 13, 2008 (12:00 PM ET). Your expression of intent is not binding but will greatly assist us in planning for the proposal evaluation.

INTEND TO SUBMIT A PROPOSAL

DO NOT INTEND TO SUBMIT A PROPOSAL FOR THE FOLLOWING REASONS:

I GRANT PERMISSION TO THE AGENCY FOR HEALTHCARE RESEARCH AND QUALITY, CONTRACTS OFFICE TO ADD THE CONTACT INFORMATION BELOW TO A BIDDERS LIST TO PROVIDE TO OTHER INTERESTED OFFERORS FOR TEAMING/SUBCONTRACTING OPPORTUNITIES. (*MUST INCLUDE AUTHORIZED SIGNATURE)

COMPANY/INSTITUTION NAME & ADDRESS:

*AUTHORIZED SIGNATURE: _____

TYPED/PRINT NAME AND TITLE: _____

DATE: _____

PLEASE DO NOT RELEASE THE CONTACT INFORMATION.

Please return to: Jessica Alderton
Agency for Healthcare Research and Quality
Contracts Management
540 Gaither Road
Rockville, Maryland 20850

BREAKDOWN OF PROPOSED ESTIMATED COST (PLUS FEE) AND LABOR HOURS**INSTRUCTIONS FOR USE OF THE FORMAT**

1. Refer to Business Proposal Instructions, Section L of this solicitation. The Instructions contain the requirements for proper submission of cost/price data which must be adhered to.
2. This sample format has been prepared as a universal guideline for all solicitations. It may require amending to meet the specific requirements of this solicitation. For example, this solicitation may require the submission of cost/price data for three years listed on this form. (See Section L, Instructions, Conditions and Notices to Offerors, for the estimated duration of this project.) If this solicitation is phased, identify each phase in addition to each year. Total each year, phase, and sub-element.
3. This format must be used to submit the breakdown of all proposed estimated cost elements. List each cost element and sub-element for direct costs, indirect costs and fee, if applicable. In addition, provide detailed calculations for all items. For example:
 - a. For all personnel, list the name, title, rate per hour and number of hours proposed. If a pool of personnel is proposed, list the composition of the pool and how the cost proposed was calculated. List the factor used for prorating Year One and the escalation rate applied between years.

Offeror's proposal should be stated in the same terms as will be used to account for and record direct labor under a contract (i.e. percentage of effort is used for most faculty and professional employees at educational institutions). If percentages of effort are used, the basis to which such percentages are applied must also be submitted by the offeror. The attached format should be revised to accommodate direct labor proposed as a percentage of effort.
 - b. For all materials, supplies, and other direct costs, list all unit prices, etc., to detail how the calculations were made.
 - c. For all indirect costs, list the rates applied and the base the rate is applied to.
 - d. For all travel, list the specifics for each trip.
 - e. For any subcontract proposed, submit a separate breakdown format.
 - f. Justification for the need of some cost elements may be listed as an attachment, i.e., special equipment, above average consultant fees, etc.
4. If the Government has provided "uniform pricing assumptions" for this solicitation, the offeror must comply with and identify each item.

RFP Number:
 Organization:
 Date:

BREAKDOWN OF PROPOSED ESTIMATED COST (PLUS FEE) AND LABOR HOURS

<u>COST ELEMENT</u>	OptionOption					<u>Total</u>
	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 1</u>	<u>Year 2</u>	
<u>DIRECT LABOR:</u>						
<u>Labor Category</u> (Title and Name-- use additional pages as necessary)	<u>Rate</u>	<u>Hours</u> <u>Amt</u>	<u>Hours</u> <u>Amt</u>	<u>Hours</u> <u>Amt</u>	<u>Hours</u> <u>Amt</u>	<u>Hours</u> <u>Amt</u>
<u>DIRECT LABOR COST:</u>	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<u>MATERIAL COST:</u>	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<u>TRAVEL COST:</u>	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<u>OTHER (Specify)</u>	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<u>OTHER (Specify)</u>	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<u>TOTAL DIRECT COST:</u>	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<u>FRINGE BENEFIT COST:</u> (if applicable)						
___% of Direct Labor Cost	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<u>INDIRECT COST:</u>						
___% of Total Direct Cost	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<u>TOTAL COST:</u>	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<u>FIXED & AWARD FEES:</u> (if applicable)						
___% of Total Est. Cost	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
<u>GRAND TOTAL EST COST</u>	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

Performance Factor	Key Performance Standards	Surveillance Methods
<p>1. Perform administrative and planning activities (cont'd).</p>	<p>accuracy and completeness of content, compliance with SOW requirements, and editorial accuracy.</p> <p>j. Contractor performs work in a cost efficient manner, as demonstrated by: (1) appropriate mix of senior, mid-level and junior staff and technical experts, based on the specific task requirements; and (2) provision of practical and economical technical solutions that meet project needs and do not contain unnecessary features,</p> <p>k. Contractor is pro-active with respect to (1) identifying implications of changes in requirements or approaches in selected tasks on other project activities; and (2) presenting options with the associated advantages and disadvantages, where viable alternative approaches are available.</p> <p>l. Contractor staff and expert consultants demonstrate the skills and experience required for their respective tasks. Contractor staff and expert consultants maintain effective working relationships with the PO, other Government staff, and CVE representatives.</p> <p>m. Invoices are clear, accurate, and complete; and include the items specified in the contract.</p>	
<p>2. Maintain and update private Web site for CVEs.</p>	<p>a. Contractor is flexible and responsive to PO comments about the Web site.</p> <p>b. Contractor efficiently and effectively posts TA resources on Web site, including, but not limited to, audios arranged by contractor of past Webinars, slidedecks from past Webinars, and slidedecks from conference presentations, including Section 508-compliant versions.</p> <p>c. TA resources are posted on Web site on a timely basis, in accordance with Schedule of Deliverables.</p> <p>d. Contractor maintains a clear, accurate and up-to-date calendar on Web site, which includes upcoming Webinars, in-person meetings and other events as specified by AHRQ. Site is updated daily, as needed.</p> <p>e. Contractor regularly (at least weekly) and effectively screens potential new</p>	<p>Review of deliverables by AHRQ PO and other Government staff.</p> <p>Feedback from Web site users.</p>

Performance Factor	Key Performance Standards	Surveillance Methods
<p>2. Maintain and update private Web site for CVEs (cont'd).</p>	<p>resources related to CVE agendas, and post those that are relevant and evidence-based onto the Web site library.</p> <p>f. Contractor ensures that all postings on Web site are Section 508 compliant.</p> <p>g. Contractor effectively tracks and reports (at least monthly) Web site activity by CVEs. Tracking and reports are accurate, current, and useful; and contain such items as number of hits (hourly, daily, or monthly); number of unique site visitors; pages visited, and other information requested by AHRQ.</p>	
<p>3. Convene Webinar series.</p>	<p>a. Contractor is flexible and responsive to PO comments about the Webinar series.</p> <p>b. In coordination with AHRQ, Contractor efficiently and effectively plans and implements 2-3 Webinars per month. Webinars effectively reflect CVE needs assessments, Webinar/meeting evaluations, and Webinar marketing plan.</p> <p>c. Marketing Plan for upcoming Webinars is clear, accurate, complete and useful in describing Webinars and effective in attracting participants. Plan includes, at a minimum, maintaining an up-to-date calendar on the Web site, indicating the date, title, topic, summary and presenter(s) of Webinars.</p> <p>d. Marketing Plan for Webinars is submitted on a timely basis, in accordance with Schedule of Deliverables.</p> <p>e. Contractor effectively identifies and suggests appropriate expert speaker(s) for Webinar topics. Proposed Webinar speakers demonstrate strong capabilities relevant to topic, e.g., substantial familiarity with the evidence base and collaboratives and ability to share peer-to-peer experiences related to Webinar agenda.</p> <p>f. Contractor develops clear, well-organized and useful agenda and summary for each Webinar.</p> <p>g. Webinar agenda, summary and names of proposed speakers are submitted on a timely basis, in accordance with Schedule of Deliverables.</p> <p>h. Contractor efficiently and effectively markets Webinars (e.g., via Web site</p>	<p>Review of deliverables by AHRQ PO and other Government staff.</p> <p>Review of deliverables by AHRQ PO and other Government staff.</p> <p>Feedback from Webinar participants.</p>

Performance Factor	Key Performance Standards	Surveillance Methods
<p>3. Convene Webinar series (cont'd).</p>	<p>postings and other announcements), and tracks Webinar registrants.</p> <p>i. Contractor efficiently and effectively arranges audio of Webinars, reviews draft slides from presenters and makes appropriate editorial suggestions.</p> <p>j. Contractor develops clear, concise and useful AHRQ introductory talking points for each Webinar, and forwards this along with accurate and current registration list to AHRQ at least 2 days before Webinar.</p> <p>k. Contractor efficiently and effectively develops Section 508-compliant slides of Webinar and posts these along with original slidedeck and audio recording on Web site. Postings are made not later than 1 week after Webinar.</p> <p>l. Contractor develops efficient and effective on-line survey for obtaining feedback from Webinar participants. This is demonstrated by on-line survey being (1) clear, well-organized and user friendly; and (2) inclusive of measures related to topic and presenter effectiveness and ease of access; and (3) useful in to assessing extent to which Webinar objectives were achieved.</p> <p>Contractor efficiently and effectively tracks Webinar participation over time by CVEs and stakeholder categories. Tracking information is provided on a monthly basis.</p> <p>Contractor develops and updates quarterly, a 6-month work plan. Work plan is clear, accurate, complete and useful in describing the Webinar-related activities planned for the 6-month period. Work plan includes the nature and schedule of the activities and effectively incorporates lessons learned from the previous quarter.</p> <p>6-month work plan for Webinars is submitted on a timely basis, in accordance with Schedule of Deliverables.</p>	<p>Review of deliverables by AHRQ PO and other Government staff.</p> <p>Feedback from Webinar participants.</p>
<p>4. Convene two in-person meetings per year for approximately 175 persons each.</p>	<p>a. Contractor is flexible and responsive to PO comments about the in-person meetings.</p> <p>b. In collaboration with AHRQ, Contractor develops agenda for meeting that is clear, well-organized, accurate, relevant to CVE needs and meeting</p>	<p>Review of deliverables by AHRQ PO and other Government staff.</p>

Performance Factor	Key Performance Standards	Surveillance Methods
<p>4. Convene two in-person meetings per year for approximately 175 persons each (cont'd).</p>	<p>objectives, and useful in conveying the topics, speakers, schedules, and locations for the meeting sessions and networking opportunities.</p> <p>c. Contractor effectively identifies and suggests appropriate speakers for meetings that are expert in their respective disciplines and experienced in working with CVEs.</p> <p>d. Meeting agenda and list of suggested speakers are submitted on a timely basis, in accordance with Schedule of Deliverables.</p> <p>e. Contractor works effectively with speakers in refining presentations to meet CVE needs, including critically reviewing presentation slides.</p> <p>f. Contractor provides efficient and effective logistical support for meetings, including: (1) where Agency facilities are not used, identifying hotels in DC metro area that effectively support meeting needs, selecting hotel in consultation with AHRQ, and signing effective hotel contract; (2) arranging travel and logistics for up to 144 CVE stakeholders and about 20 guests (plus 10 speakers/faculty), including letters of invitation and tracking of RSVPs; (3) arranging food and refreshments; (4) preparing and distributing meeting folders, including, at a minimum, agenda, participant lists, speaker bios, copy of presentations, and evaluation form; (5) preparing participant name tags and speaker tent cards; and (6) reimbursing travel expenses of participants and honoraria for faculty.</p> <p>g. Logistical support for meetings is provided on a timely basis, in accordance with Schedule of Deliverables.</p> <p>h. Contractor provides effective facilitation support for meetings, including being proactive in encouraging CVE stakeholders to participate in sessions, and bringing stakeholders together for networking opportunities.</p> <p>i. Contractor effectively develops Section 508-compliant slides of speaker slidedecks and posts these along with original slidedecks on Web site. Postings are made not later than 2 weeks after meeting.</p> <p>Contractor designs and implements a clear, concise and useful evaluation form for the meeting. Evaluation report is clear, well-organized, accurate and useful in</p>	<p>Feedback from meeting participants and speakers.</p> <p>Review of deliverables by AHRQ PO and other Government staff.</p> <p>Feedback from meeting participants.</p> <p>Review of deliverables</p>

Performance Factor	Key Performance Standards	Surveillance Methods
<p>4. Convene two in-person meetings per year for approximately 175 persons each (cont'd).</p>	<p>assessing the organization, content, speakers, logistics, and relevance/usefulness of the meeting. Evaluation report is submitted not later than 2 weeks after the meeting.</p> <p>Contractor develops and updates quarterly, a 6-month work plan. Work plan is clear, accurate, complete and useful in describing the meeting activities planned for the 6-month period. Work plan includes the nature and schedule of the activities and effectively incorporates lessons learned from the previous quarter.</p> <p>6-month work plan for in-person meetings is submitted on a timely basis, in accordance with Schedule of Deliverables.</p>	<p>by AHRQ PO and other Government staff.</p>
<p>5. Convene Workgroup on standard report elements.</p>	<p>a. Contractor is flexible and responsive to PO comments about the Workgroup on standard report elements.</p> <p>b. Contractor develops an e-mail for CVE stakeholders that is clear, complete, and useful in identifying CVE member interest as a participant on the Workgroup. The e-mail is submitted on a timely basis, in accordance with Schedule of Deliverables.</p> <p>c. In collaboration with AHRQ, Contractor develops agenda for Workgroup meeting or call that is clear, well-organized, and relevant to workgroup and meeting/call objectives. Contractor effectively identifies potential experts for participation.</p> <p>d. Contractor provides efficient and effective logistical support for Workgroup meeting(s), including: (1) where Agency facilities are not used, identifying hotels in DC metro area that effectively support meeting needs, selecting hotel in consultation with AHRQ, and signing effective hotel contract; (2) arranging travel and logistics for participants and experts, including e-mail notification and tracking of RSVPs; (3) arranging food and refreshments; (4) preparing and distributing meeting folders, including, at a minimum, agenda, participant list, and presentation materials; (5) preparing participant tent cards; and (6) reimbursing travel expenses of participants and honoraria for any faculty. Logistical support is provided on a timely basis, in accordance with Schedule of Deliverables.</p>	<p>Review of deliverables by AHRQ PO and other Government staff.</p> <p>Feedback from Workgroup members.</p> <p>Review of deliverables by AHRQ PO and other Government staff.</p> <p>Feedback from Workgroup members.</p>

Performance Factor	Key Performance Standards	Surveillance Methods
<p>5. Convene Workgroup on standard report elements (cont'd).</p>	<p>e. Contractor provides a qualified facilitator for each meeting with expertise in facilitation and experience in facilitating workgroup meetings related to health care issues. Contractor provides effective facilitation support for Workgroup meeting such that (1) meeting objectives are achieved; (2) all participants have an opportunity to offer input to the discussions; (3) clear recommendations and action items are reached and documented.</p> <p>Contractor prepares summaries (highlights) of Workgroup meetings or teleconferences that are clear, accurate, complete and useful; and describe Workgroup members participating, key issues discussed, and recommendations and action items. Summaries are submitted on a timely basis, in accordance with Schedule of Deliverables.</p> <p>Contractor prepares working paper summarizing the aggregate deliberations of the Workgroup that is clear, accurate complete, and useful in summarizing the issues discussed in the meetings or calls, recommendations and next steps, Working paper is submitted on a timely basis, in accordance with Schedule of Deliverables.</p> <p>h. Contractor efficiently and effectively convenes Webinar(s) or conference call(s) to enable Workgroup to vet deliberations with broader CVE community.</p>	

Attachment 5 – Slidedeck of CVE Program

Go to <http://www.ahrq.gov/downloads/pub/contract/cve/cve1.ppt> to access the slide presentation (Powerpoint File, 1.4 MB) .

Attachment 6 – Slidedeck of CVE Learning Network

Go to <http://www.ahrq.gov/downloads/pub/contract/cve/cve2.ppt> to access the slide presentation (Powerpoint File, 1.8 MB).

Attachment 7 – ‘CVE Technical Assistance Needs’

Go to the Excel Spreadsheet, at <http://www.ahrq.gov/downloads/pub/contract/cve/cvetaneeds.xls>

Attachment 8: Sample Pages From Private Web Site

The screenshot shows a Microsoft Internet Explorer browser window titled "Chartered Value Exchanges - Microsoft Internet Explorer". The address bar contains the URL "http://www.cvelearningnetwork.org/Default.asp?". The main content area displays the "CVE Learning Network Calendar" for "November 2008". The calendar is a grid with columns for days of the week and rows for dates. Events are listed in yellow boxes on specific dates:

Monday	Tuesday	Wednesday	Thursday	Friday
3	4	5 Teleconference: Project Directors Call	6 Webinar: The Art and Science of CVE Sustainability II: Real Life Experience in Oregon and Louisiana	7
10	11	12	13	14
17	18	19	20 Webinar: Input Your Data--Output Your Web Site: A Web-Based Tool for Quality & Utilization Reporting	21
24	25	26	27	28

Below the calendar, there is a navigation menu with links: MEMBERS, CVE, TA, FORUM, CALENDAR, PROGRAM INFO, LIBRARY & LINKS. At the bottom of the page, there is a list of categories: Collaborative Leadership, Consumer Incentives, Provider Incentives, Public At-large Engagement, Public Reporting, Quality & Efficiency Measurement, Capacity for Improving Quality, and HIT/HIE.

Chartered Value Exchanges - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://www.cvelearningnetwork.org/doc.asp?id=61> Go Links



Chartered Value Exchanges

Supported by the U.S. Department of Health and Human Services
Agency for Healthcare Research and Quality

Library & Links

Welcome, Jan De La Mare (logout) - (profile) Last Updated 11/17/2008

[Home](#) • [Library & Links](#)

Library & Links

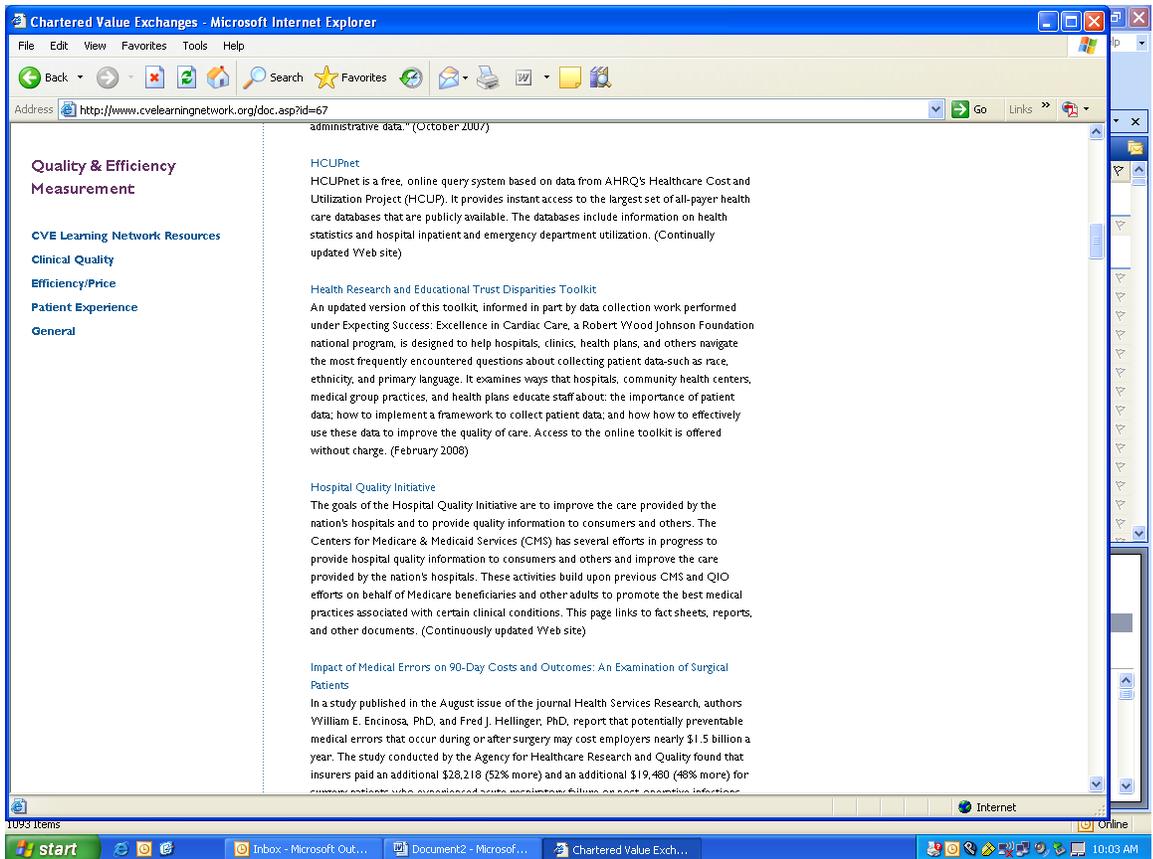
- [Collaborative Leadership & Sustainability](#)
- [Public At-large Engagement](#)
- [Quality & Efficiency Measurement](#)
- [Public Reporting](#)
- [Provider Incentives](#)
- [Consumer Incentives](#)
- [Capacity for Improving Quality](#)
- [Health Information Technology/Health Information Exchange](#)
- [Other](#)

[MEMBERS](#) [CVE](#) [TA](#) [FORUM](#) [CALENDAR](#) [PROGRAM INFO](#) [LIBRARY & LINKS](#)



Done 100% Items Internet

start | In-box - Microsoft Out... | Document2 - Microsof... | Chartered Value Exch... | 10:02 AM



Attachment 9: Agenda for October 2008 Meeting of CVEs

AHRQ's Learning Network for Chartered Value Exchanges (CVEs)

Hilton Washington
1919 Connecticut Avenue NW, Washington, DC

October 2 – 3, 2008
Agenda

The meeting on Thursday, October 2 is designed exclusively for the new (second) cohort of CVEs. The meeting on Friday, October 3, is for all CVEs.

Meeting Objectives:

- Charter new CVEs, and provide them with an introduction to AHRQ and an overview of Learning Network activities
- Provide networking opportunities for CVE representatives from first and second cohorts to meet each other
- Provide opportunities for CVE representatives to interact with national and local experts on emerging quality and transparency strategies
- Provide venue for selected technical assistance

THURSDAY, OCTOBER 2, 2008

8:00 – 8:45

Registration Check-in

Informal Breakfast for CVEs at the AHRQ Exhibit Café

TERRACE LEVEL - Back Terrace Foyer

Exhibit will feature AHRQ tools and resources on:

- Data and measurement
- Public report cards
- Public at-large engagement
- Provider and consumer incentives
- Quality improvement

8:45 – 9:30

CVE Group Photos

CONCOURSE LEVEL – International Ballroom West

To streamline the photo-taking process, we ask that each CVE delegation promptly be seated at 8:45 at designated CVE tables.

9:30 – 10:00

Official Chartering of New Chartered Value Exchanges
Ballroom West

CONCOURSE LEVEL – International

- Tevi Troy, Deputy Secretary, U.S. Department of Health and Human Services
- Carolyn Clancy, Director, AHRQ

10:00 – 11:15

How Can We Effectively – or More Effectively – Design Public Reporting to Support Consumer Value-Based Decision-Making?

CONCOURSE LEVEL – International Ballroom West

Shoshanna Sofaer and CVEs will explore how they might implement strategies that build upon the research and practical lessons about what information consumers want and how and when they want it. Dr. Sofaer will draw from a library of AHRQ public reporting resources: *talkingquality.gov* Web site, Report Card Compendium, Quality Indicator Model Report and *How to Effectively Present Health Care Performance Data to Consumers*, the first in a best practices report card series developed specifically for CVEs. The session will address the following questions:

- What information do consumers want to help them make health care decisions? How and when do they want to receive this information?
- What information do consumers *not* want?
- How can data be effectively displayed for greatest understanding by consumers?
- Do consumer reports of provider or health plan quality influence consumer decision-making?
- How can we more effectively make public reporting initiatives support consumer decision-making?
- How can the Quality Indicator Model Report be adapted to CVE efforts?
- How can we evaluate the success of report cards and other efforts to communicate with consumers about quality?

Speaker: Shoshanna Sofaer
CVE Reactor

11:15 – 11:30 Break

TERRACE LEVEL - Back Terrace Foyer

11:30 – 12:30 Breakout Sessions – Select One of Two

AHRQ Sampler #1

Hospital Data Resources and Tools for CVEs

CONCOURSE LEVEL – Military Room

All of the new CVEs reside in a state with a statewide hospital database, and 10 of the 11 are in states that partner with AHRQ's HCUP program to standardize the databases across states. Anne Elixhauser will provide an overview of state health care data resources (covering hospital, emergency department (ED), and ambulatory surgery care), HCUPnet (an interactive tool for identifying and comparing hospital and ED statistics at the national and state levels), the Preventable Hospitalization Costs Mapping Tool and the hospital Quality Indicators software. Dr. Elixhauser also will preview a new tool in development, tentatively called "Input Data – Output Website." This family of AHRQ tools can address CVE questions such as:

- How does your state compare with other states, and the nation, in terms of – *How many* CABGs were performed? What is the *trend* in hospitalizations for MRSA? What is the *cost* of C-section versus vaginal deliveries?
- What are the rates of hospitalization – available by county – in your CVE for a range of “preventable admissions,” and what savings might be achieved from a reduction in these admissions?
- At a national level – What are national benchmarks on quality measures such as in-hospital mortality for specific procedures and conditions and patient safety indicators?
- How prevalent are preventable admissions, and how much do they cost the health care system?

Speaker: Anne Elixhauser
CVE Reactor

AHRQ Sampler #2

Consumer Engagement Resources for CVEs

CONCOURSE LEVEL – Hemisphere Room

Al Lazar and William Lawrence will showcase several AHRQ tools designed to promote consumer engagement. The *Questions Are the Answer* campaign (an AHRQ-supported public service campaign) and companion online Question Builder seeks to encourage consumers to be more active and involved in their interactions with their physicians. A set of Comparative Effectiveness Research Guides for Consumers (which includes guides on gastroesophageal reflux disease, blood pressure medicines, antidepressant medicines, treatments for localized prostate cancer, medications for osteoporosis, and medications for rheumatoid arthritis) summarize relevant evidence for a consumer audience. The session will address the following questions:

- How are community stakeholders integrating the *Questions Are the Answer* campaign (AHRQ-supported public service campaign) and companion online Question Builder into their consumer engagement agendas?
- How are community stakeholders using AHRQ’s Comparative Effectiveness Research Guides for Consumers to promote high value care?
- How do I get a copy of these tools?

Speakers: Al Lazar, William Lawrence
CVE Reactor

12:30 – 2:00 CVE Intra-Networking Box Lunch

TERRACE LEVEL - Back Terrace Foyer

Pick up box lunch, after which “discussion corners” are reserved for each CVE in breakout rooms indicated below:

Each CVE delegation will have an opportunity to meet as a team over lunch to identify concrete next steps to advance transparency and quality improvement in respective communities. A breakout area is being reserved for each CVE.

2:15 – 3:30 Breakout Sessions – Select One of Two

AHRQ Sampler #3

Improving Quality through Health Information Technology

CONCOURSE LEVEL – Military Room

Jon White, director of AHRQ's Health Information Technology portfolio, will describe ongoing work of AHRQ and its grantees to improve health care quality through the use of health IT. In addition, Dr. White will discuss the role of AHIC and will preview three AHRQ grant solicitations that are currently open. Rainu Kaushal and Marc Overhage, AHRQ grantees from two CVE states – New York and Indiana - will share their ongoing projects and offer some learnings to date. The session will address the following questions:

- What is the role of AHRQ in advancing the potential of health IT to improve quality?
- What is happening at the state and local levels, and in particular CVE regions, with respect to health IT?
- What lessons can be learned regarding health IT connectivity across providers?
- What does the evidence indicate in terms of health IT and its potential to improve quality?
- What role can health IT play, now and in the future, with respect to capturing quality measures for CVE transparency initiatives?

Speakers: Jon White, Rainu Kaushal, Marc Overhage

AHRQ Sampler #4

CAHPS as a Resource for CVEs

CONCOURSE LEVEL – Hemisphere Room

Chuck Darby will provide an overview of CAHPS, a public-private initiative to develop a standardized family of surveys to assess patients' experiences with care, which can be integrated into CVE public reporting and incentive programs. NQF-endorsed physician CAHPS and hospital CAHPS (ratings are now available for all hospitals) will be featured, and composite measures will be summarized. The related CAHPS benchmarking database – and how it can be used by CVEs – will be described. The session will address:

- What is patient experience of care, and how does it fit within a broader CVE quality framework?
- Why is it important to measure the patient's experience of care?
- What do we know about patient experience ratings for U.S. hospitals and physicians in aggregate?
- What tools are available from AHRQ to measure and report experience of care?
- What resources – funding, technical expertise and lead time – are needed to field CAHPS?
- What assistance is available to CVEs to use these tools?

Speaker: Chuck Darby
CVE Reactor

3:30 – 3:45 Break

TERRACE LEVEL - Back Terrace Foyer

3:45 – 4:45

CVE Exercise - Identifying Ingredients for CVE Success in Building a Transparent Health Care System that Promotes Value

CONCOURSE LEVEL – International Ballroom West

Participants from each stakeholder category will form a workgroup to identify:

- Three critical ingredients needed for the CVE's success, and
- A key barrier to success and potential strategies for overcoming the barrier.

Each stakeholder workgroup will report back to the larger group. Stakeholder workgroups include:

- Consumer organizations
- Providers
- Health plans
- Purchasers
- CVE administrators/conveners
- QIOs, state data organizations, and other stakeholders

Facilitator: Irene Fraser

4:45 – 5:00

Overview of AHRQ Learning Network for CVEs [CONCOURSE LEVEL – International Ballroom West](#)

This session will provide information on the philosophy of technical assistance (TA) being provided to CVEs through the AHRQ Learning Network and describe the Learning Network's eight focus areas. This session will include time for CVE comments and questions, and CVE input will be explicitly solicited.

Speakers: Peggy McNamara, Jan De La Mare

5:00 – 6:30

Informal CVE Networking Reception

[LOBBY LEVEL – Capital Court Bar](#)

This is an opportunity for CVEs to network informally with participants from other CVEs. Look for signs designating the area for CVE members.

Cash hors d'oeuvres and cash bar at hotel

6:30

Dinner on your own

Please see restaurant suggestions within walking distance of hotel in meeting folder. Hotel concierge can assist with reservations.

FRIDAY, OCTOBER 3, 2008

8:00 – 9:00

Registration Check-in

Informal Breakfast for CVEs at the AHRQ Exhibit Café

[TERRACE LEVEL – Back Terrace Foyer](#)

Exhibit will feature AHRQ tools and resources on:

- Data and measurement
- Public report cards
- Public at-large engagement
- Provider and consumer incentives
- Quality improvement

9:00 – 10:00

Perspectives on Chartered Value Exchanges in a Changing

Health Care Environment

CONCOURSE LEVEL – International Ballroom West

Carolyn Clancy will introduce CVEs to AHRQ's mission and priorities. She will provide an overview of the current state of quality, which frames the CVE transparency imperative. Dr. Clancy will conclude with an overview of what we know about our first two cohorts of CVEs. This session will include time for CVE comments and questions.

Speaker: Carolyn Clancy

10:00 – 11:30

Pay for Performance – Latest Evidence from AHRQ_ CONCOURSE LEVEL – International Ballroom West

Pay-for-performance (P4P) programs are designed to offer financial incentives to health care providers to meet defined quality, efficiency, or other targets. There are many decisions that go into the design of a P4P program, and each decision affects the likelihood that a program will achieve its goals. Two AHRQ-supported researchers, Adams Dudley and Meredith Rosenthal, will present their portfolio of P4P research and tools. Dr. Dudley and Dr. Rosenthal will review questions that private and public purchasers and health plans face in considering pay for performance, review options and any available evidence—from empirical evaluations and economic theory—that informs decision making. This session will address:

- What do we know about physician interest in pay for performance?
- For physician pay for performance, should we target group practices or individual physicians?
- For incentives that target physician practices, how are incentives passed along to individual physicians?
- What is the role of executives in achieving successful pay-for-performance programs?
- Is there any special advice for Medicaid agencies and Medicaid managed care plans interested in pay for performance?
- Should provider participation be voluntary or mandatory?
- Should we use carrots or sticks—bonuses or penalties—or a combination?
- How should the bonus be structured?
- Should we use relative or absolute performance thresholds?
- What are our options for phasing in pay for performance?
- Where do we find the money?
- How much money should we put into performance pay?
- What measure characteristics make them attractive candidates for inclusion in an initial measure set?

Speakers: Adams Dudley, Meredith Rosenthal

11:30 – 11:45
BQI Project Update

CONCOURSE LEVEL – International Ballroom West

Barbra Rabson will provide a short preview of an upcoming CVE Webinar on the BQI Project (Better Quality Information to Improve Care for Medicare Beneficiaries), which will issue its final report this Fall. The BQI project is a CMS-sponsored initiative with six regional collaboratives – 5 of which are CVEs – to test aggregation of Medicare claims data with multi-payer data, and calculation of measures of physician performance.

Speaker: Barbra Rabson

11:45 – 1:00
Buffet Lunch

CONCOURSE LEVEL – Hemisphere and Military Rooms

*Buffet set up outside of Hemisphere and Military Rooms –
Hemisphere and Military Rooms will be set up for informal CVE lunch.*

1:00 – 2:45

Hands-on Report Card Design Consultation Workshop
CONCOURSE LEVEL – International Ballroom West

CVE stakeholders from 3 states have volunteered to have their respective report cards critiqued by report card expert, Shoshanna Sofaer. Featured report cards measure the performance of medical groups and clinics as well as hospitals, and include a range of quality measures as well as provider charges as well as composite measures. Web-based and printed report cards will be discussed. The workshop will address the “do’s” and “don’ts” of report card design.

Facilitator: Shoshanna Sofaer
3 CVE Report Card Presenters

2:45 – 3:00 Break

TERRACE LEVEL – Back Terrace Foyer

3:00 – 5:00

CVE Sustainability Planning:
Bring Your Questions and Comments

CONCOURSE LEVEL – International Ballroom West

Carolyn Clancy will lead a discussion of CVE sustainability issues. Lisette Lejnieks will summarize what we have learned about CVE funding models as well as CVE value models and governance models, based on her case studies and pilot projects with 5 CVEs. How does your CVE’s funding model compare with other collaboratives? Dr. Clancy will review the goals of the AHRQ CVE Sustainability Workgroup, which was convened in August 2008 to identify CVE conditions or attributes that have potential to enhance individual CVE sustainability and to explore potential models for an umbrella entity that might play a role in enhancing individual CVE sustainability. A member of the CVE Sustainability Workgroup, will preview interim

analyses and actively seek feedback from the broader group of CVE stakeholders. Bring your questions about funding strategies, value propositions and governance, and share your experiences!

Speakers: Carolyn Clancy, Lisette Lejniaks, CVE Sustainability Workgroup members

5:00 Meeting Adjourned

Attachment 10: Examples of Past Webinar Agendas

Performance Measurement Series Webinar The Wonderful World of Quality Metrics September 11, 2008

What are the key approaches to defining and conceptualizing quality of care, and what are their relative strengths and weaknesses? What are key sources of hospital and physician data for quality measurement, including patient surveys, claims or administrative data, and medical records? What role do national organizations play in quality measurement? These and other CVE questions will be answered by Patrick Romano, MD, MPH. Two representatives from CVEs will share how they went about selecting measures, and how they met their biggest measurement challenges.

Webinar Objectives:

- Describe key approaches to defining and conceptualizing quality of care.
- Explain the major types of quality measures, and their strengths and limitations.
- Describe the role of leading national organizations involved in quality measurement.
- Identify general sources of hospital and physician data for quality measurement, including patient surveys, claims or administrative data, and medical records, as well as the pros and cons of each.
- Describe some of the most widely used quality measure sets at the state and national levels including their strengths and limitations.
- Provide guidance to CVEs on how to evaluate, prioritize, and select measures, including information on national review and endorsement of measures.
- Learn how two CVEs went about selecting their measures. What was their biggest measurement challenge, and how did they approach it?

Agenda

2:30 p.m.-2:40 p.m. Welcome and Opening Remarks

Peggy McNamara, MSPH

Senior Fellow, Agency for Healthcare Research and Quality

2:40 p.m.- 3:15 p.m. Overview of Quality Metrics

Patrick Romano, MD, MPH

Professor of Medicine and Pediatrics, University of California at Davis

3:15 p.m.-3:35 p.m. CVE Reactors

Representatives from 2 CVEs share their experience in measure selection.

3:35 p.m.-3:55 p.m. Q & A

All

3:55 p.m.-4:00 p.m. Close

Public At-Large Engagement Webinar
How to Engage Consumer Organizations Within Your CVE
September 25, 2008

Consumers organizations are critical to CVE goals related to quality, transparency, and value. They are a credible source with their finger on the pulse of the consumer market. What are the best ways to identify and involve consumer advocates and keep them engaged over the long term? Learn about the unique roles that consumer advocates play from Jennifer Sweeney, MA, of the National Partnership for Women & Families. She'll provide practical tools and tips for CVEs. We'll also hear first-hand experiences from the perspective of a CVE leader and a consumer advocate involved with a CVE.

Objectives:

- Affirm the value and discuss the role(s) of consumer advocates as one of the four key stakeholders of your CVE
- Learn how to effectively recruit, engage, educate, and activate consumer advocate organizations
- Learn from two CVE members' experience engaging consumer advocates

Agenda

2:00 p.m.-2:10 p.m. Welcome and Opening Remarks

Peggy McNamara, MSPH

Senior Fellow, Agency for Healthcare Research and Quality

2:10 p.m.-2:35 p.m. Overview Consumer Advocate Engagement Toolkit

Jennifer Sweeney, MA

Director, Americans for Quality Health Care, National Partnership for Women and Families

2:35 p.m.-3:00 p.m. CVE Reactors

A CVE leader and a CVE consumer advocate member share their perspectives on engaging consumer advocates

3:00 p.m.-3:25 p.m. Q & A

All

3:25 p.m.-3:30 p.m. Close