

**It is strongly recommended that Offerors use the following template as the Table of Contents for the Technical Proposal. All information presented in the Technical Proposal should be presented in the order specified below.**

These Additional Technical Proposal instructions reflect the requirements of the Request for Proposal (RFP) and provide specific instructions and formatting for the Technical Proposal. While Section L.2.b. of the RFP general Technical Proposal instructions, these Additional Technical Proposal Instructions are tailored to the specific requirements of the RFP. The information requested in these instructions should be used, along with Section L. to format and prepare the Technical Proposal, and should be used as a Table of Contents for your Technical Proposal.

The Offeror is advised to give careful consideration to the Statement of Work (SOW), the Technical Evaluation Criteria in Section M, and the RFP as a whole in the development of their Technical Proposal.

The Offeror should submit a proposal that addresses the Task Areas in the Statement of Work. If the proposed approach will involve a subcontracting arrangement(s), then the Offeror shall include a letter of commitment from the subcontractor(s), plus documentation of subcontractor's expertise, qualifications and prior performance, supporting documentation for costs proposed, as well as a narrative describing how the Offeror will manage the subcontractor.

**The Offeror must adhere to a 120-page limit. Pages in excess of this limitation will be removed from the proposal and will not be provided to the reviewers to be read or evaluated.**

**Pages shall be of standard size (8.5x11) with a font size of 10 points or larger. Proposal pages shall be numbered "Page 1 of 120", "Page 2 of 120" and so on. Hardcopies of proposals should be printed double-sided (2 sides = 2 pages), single-spaced flip up. The 120-page limit excludes the cover sheet, resumes, and all appendices or attachments.**

### **SECTION 1: COVER PAGES AND TABLE OF CONTENTS**

- A. PROPOSAL TITLE PAGE. Include RFP title and number, name of organization, DUNS number, proposal part, and identify if the proposal is an original or a copy;
- B. PROJECT OBJECTIVES;
- C. GOVERNMENT NOTICE FOR HANDLING PROPOSALS;
- D. PROPOSAL SUMMARY AND DATA RECORD (NIH-2043);
- E. TABLE OF CONTENTS. Include a Table of Contents with indicated pages of proposal sections that at a minimum uses the underlined Headings and Subheadings that appear below. Additional subheadings may be entered at the Offeror's discretion.

## **SECTION 2: TECHNICAL DISCUSSIONS**

### **A. Technical Approach & Protocols**

1. As part of the response to this RFP, the Contractor shall describe their approach to identifying and instantiating an Information Management System (IMS) and include an estimated budget in the Cost Proposal. The IMS may be a Commercial-Off-the-Shelf (COTS) or Open Source system, but will not be Government furnished, unless the Contractor is familiar with an adequate Government owned IMS, which may be considered.
2. A detailed work plan should be submitted indicating how each aspect of the Statement of Work (SOW) is to be accomplished. Your technical proposal should be in as much detail as you consider necessary to explain fully your proposed methods and rationale for their selection. Your proposal should reflect a clear understanding of the nature of the work being undertaken, as well as the technical, scientific and operational problems and solutions associated with accomplishing the Statement of Work. The technical proposal must also include information on how the project is to be organized, staffed, and managed. Information should be provided which will demonstrate your understanding of management of timeframes for planning and accomplishing the work to be performed.
3. The Offeror should discuss their ability to serve in a Quality Management capacity on a large biomedical informatics program as this role will require the Offeror to manage the quality practices of the entire program.
4. Describe proposed methods for compliance with FISMA security at Low/Moderate for databases, documentation, related software, and all necessary elements.
5. The Offeror should discuss approaches to meet the data security and data confidentiality requirements and describe the automated backup systems which should be in place for the duration of the project.
6. Provide a draft IT-Security (IT-SP) Plan.

### **B. Personnel**

The Technical Proposal should include all information relevant to document individuals' training, education, experience, qualifications and expertise necessary for the successful completion of all contract requirements. The Technical Proposal should include a Staffing Plan with role descriptions of key technical personnel. Include the highest degree, organizational affiliation (employer) and percentage of effort to be committed to the project, including technical personnel of all proposed subcontractors and consultant personnel.

Include for each named person a Curricula Vitae (CV), that is limited to 2-3 pages and include experience with projects of similar scope, size and complexity.

1. Provide documentation of project management experience in a team that demonstrates the capability to manage a project of this size and complexity.

**Project Manager:** Describe the education, training, experience, expertise, qualifications, and level of effort of the proposed Project Manager to lead and direct the activities to be carried out under this contract. The qualifications and experience of the Project Manager should be discussed in terms of 1) how they are appropriate to the management of any planned subcontract(s) and consultant(s); 2) managing and coordinating the efforts of personnel required to perform functions described in the Statement of Work; 3) administrative management for the successful oversight, budgetary controls and communication with stakeholders.

**Other Technical Personnel:** Describe the education, training, experience, expertise, qualifications, role in the project, and level of effort for all proposed technical personnel of the Offeror and any proposed subcontractor(s) and consultant(s). Document relevant qualifications for: Biomedical science, clinical standards-based Quality Management Systems, QMS IMS, and statistical analysis of high-volume and complex data non-conformities, CLSI standards, CLIA guidelines, or ISO 9001, 17025, or 15189 standards, following all regulatory policies and ethical guidelines for data resulting from research involving human subjects, and working with collaborators, partners and/or other laboratories to develop and optimize a database of complex QMS for a network of researchers.

### C. Corporate Capabilities

1. The Offeror should document their organizational experience in each of the specific tasks and requirements of the Statement of Work. The Offeror should describe a plan to manage the infrastructures composed of proposed subcontractor(s) and consultant(s), if proposed.
2. Provide documentation of Offeror's experience in the development and management of a QMS based on CLSI standards, CLIA guidelines or ISO 9001, 17025 or 15189.
3. Demonstrated project management experience, including the ability to meet the deadlines and schedules within the SOW and to reassign staff, if necessary.

#### **D. Facilities, Equipment & Systems**

1. Offerors should describe their facilities, equipment and databases proposed to perform the Statement of Work, including all computer; hardware and software; computer equipment and servers; and, dedicated space for staff and equipment. Describe the secure environment for confidential storage of information.
2. Provide a detailed description of the availability and acceptability of equipment to perform the work scope including computers for informatics and data management. Contingency plans regarding need to replace equipment for maintenance and repair of equipment.

### **SECTION 3: SUSTAINABLE ACQUISITION**

**Offerors must include a Sustainable Acquisition Plan in their technical proposals that describes their approach and the quality assurance mechanisms in place for applying FAR 23.1 – sustainable Acquisition Policy (and other Federal laws, regulations and Executive orders governing green purchasing) to this acquisition.**

#### **DEFINITIONS:**

##### **A. Recycled Content Products**

Recycled content products are products that are made from or contain recovered materials. That means replacing virgin materials with recycled materials, including post-consumer materials. There are currently more than 60 designated products in eight categories: paper and paper products, vehicular, construction, landscaping, park and recreation, transportation, non-paper office, and miscellaneous products. Examples of designated products include structural fiberboard, printing and writing papers. The current list of designated products, EPA's guidance, and related technical information can be found on EPA's web site at <http://www.epa.gov>.

##### **B. Energy-Efficient Products: Energy Star®, FEMP-Designated, and Low Standby Power**

EPAct of 2005, Section 104 and FAR 23.203 require federal agencies to purchase Energy Star® qualified or Department of Energy's (DOE's) Federal Energy Management Program (FEMP)-designated products when procuring energy-consuming products.

The technical requirements that each product must meet to become Energy Star® qualified are available at ENERGY STAR Qualified Products : ENERGY STAR. Information on FEMP-designated products can be found at <http://www.eere.energy.gov/>. Information on

low standby power products can be found on FEMP's web site at:  
<http://www.eere.energy.gov>.

### **C. Biobased Products**

Biobased products are products determined by the Secretary of Agriculture to be commercial or industrial products (other than food or feed) that are composed in whole, or in significant part, of biological products or renewable domestic agricultural materials and forestry materials. Examples of USDA-designated biobased products include mobile equipment, hydraulic fluids, roof coatings, diesel fuel additives, and towels. USDA is responsible for implementing the BioPreferred<sup>SM</sup> procurement preference program. Information on these designated products, USDA's guidance, and related documentation can be found at USDA's web site at <http://www.biopreferred.gov>. (The FAR is being revised to require that Federal agencies procure designated items composed of the highest percentage of biobased content practicable [FAR Case 2010-004].)

### **D. Environmentally Preferable Products and Services**

Environmentally Preferable Products (EPP) are products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. This comparison may consider raw materials acquisition, production, manufacturing, packaging, distribution, reuse, operation, maintenance, or disposal of the products or services. Examples of environmentally preferable products include cleaning products that are non-toxic, non-volatile, and biodegradable; and paint with no or low volatile organic compounds. This program is managed by EPA which maintains a database of products and specifications defined by federal, state, and local agencies, and other nations. The database can be found at <http://www.epa.gov/epp> along with EPA's **Guidance on the Acquisition of Environmentally Preferable Products and Services** located at <http://www.epa.gov/epp/pubs/index.htm>

### **E. Electronic Product Environmental Assessment Tool (EPEAT) Products**

EPEAT is a tool for evaluating the environmental performance of electronic products throughout their life cycle. EPEAT is intended to help purchasers in the public and private sectors evaluate, compare and select desktop computers, notebooks and monitors based on their environmental attributes. EPEAT also provides a clear and consistent set of performance criteria for the design of products, and provides an opportunity for manufacturers to secure market recognition for efforts to reduce the environmental impact of its products. Available at: <http://www.epeat.net/>

### **F. Water-Efficient Products**

A water-efficient product is in the upper 25% of water efficiency for all similar products, or is at least 10% more efficient than the minimum level meeting U.S. Federal Government standards. Examples of products that have met the EPA WaterSense label include: high efficiency toilets, sink faucets, showerheads, urinals, and landscape irrigation systems. Information about the WaterSense Program is available at [www.epa.gov/watersense](http://www.epa.gov/watersense).

#### **G. Non-Ozone Depleting Substances**

E.O. 13423 and the Council on Environmental Quality (CEQ) Implementing Instructions require that each agency give preference to the purchase of non-ozone depleting substances, as identified in EPA's Significant New Alternatives Policy (SNAP) program. **FAR 23.803** states that agencies shall give preference to the procurement of alternative products that reduce overall risks to human health and the environment by lessening the depletion of ozone in the upper stratosphere. It further requires that in preparing specifications and purchase descriptions, and the acquisition of supplies and services, agencies shall comply with the requirements of the Clean Air Act and substitute safe alternatives to ozone-depleting substances.

SNAP provides lists of acceptable and unacceptable substitutes in the following sectors: fire suppressants, aerosol solvents and propellants, refrigeration and air conditioning equipments, and adhesives and coatings. SNAP is managed by EPA. Information about the SNAP Program is available on <http://www.epa.gov/ozone/strathome.html>

#### **H. Alternative Fuel Vehicles and Alternative Fuels**

Under EPCAct, alternative fuel vehicles are defined as any dedicated, flexible-fuel, or dual-fuel vehicle designed to operate on at least one alternative fuel. As defined by EPCAct, alternative fuels are substantially non-petroleum based fuels and include (but are not limited to) the following: ethanol at a 85% blend or higher (E85); liquefied petroleum gas (propane); compressed natural gas (CNG); biodiesel; electricity; hydrogen; and P-series fuels. DOE's FEMP manages this program. Information on these federal fleet requirements can be found at [http://www1.eere.energy.gov/femp/program/fedfleet\\_requirements.html](http://www1.eere.energy.gov/femp/program/fedfleet_requirements.html).

