

NN/LM GMR Subcontract Requirements

Technical Proposal Instructions

A detailed plan must be submitted indicating how the statement of work will be implemented. All elements outlined in the Statement of Work must be addressed in as much detail as necessary to demonstrate a clear understanding of the work being undertaken.

Please prepare your Technical Proposal according to the following outline:

Title Page

- Title of the project
- Date of submission
- Name of the library and institution
- Name, address, phone and fax numbers, and email address of the primary contact
- LIBID of the member organization

Mandatory Qualification Criteria for the Lead Institution (separate page)

Please check the appropriate answer to each of the following statements.

- The lead institution is an NN/LM GMR Full Member (DOCLINE® participant).
___Yes ___ No
- The lead institution is an NN/LM Affiliate Member.
___Yes ___ No
- The lead institution has a library with a health sciences collection.
___Yes ___ No
- The lead institution is willing to provide document delivery and backup reference service to the targeted institutions or communities for the duration of the project.
___Yes ___ No
- The lead institution has the ability to set up an account for the project and obtain the project funds from the NN/LM GMR on a cost-reimbursement basis.
___Yes ___ No

Statement of Work

The statement of work will include technical requirements and specific tasks. Project descriptions are expected to be succinct. The statement of work must address the following:

I. Summary

A one paragraph summary statement of the project.

This project has been funded in whole or in part with Federal funds from the National Library of Medicine, National Institutes of Health, Department of Health and Human Services, under Contract No. N01-LM-6-3503 with the University of Illinois at Chicago.

II. Introduction and Background

III. Identification of Need and Description of Target Population

Identify the target population(s) and geographic area(s) to be covered. Describe the information needs of the target population and how you determined those needs. If a needs assessment was conducted for this population, attach a copy of the needs assessment tool and describe the results of the assessment. Explain how the project will impact the target population and estimate what percentage of the target population will be reached through this project.

Indicate the rationale for the project and its relationship to comparable work elsewhere, if known. Review pertinent work already published and relate it to the proposed approach. Explain how the proposed project will improve health information access for the targeted populations.

IV. Partnerships

If partnerships are proposed, identify the specific organizations participating in the project; explain who will carry out the project, and who will be receiving the services. For each organization participating in the project, including any branches and satellite locations, information must be provided on:

- The demographics of the populations served
- Geographic areas covered
- Type of connectivity to the Internet
- The number of workstations available for staff access to the Internet
- The health information resources and/or services currently available

V. Project Objectives

State the goals and specific objectives to be achieved by the project. Objectives should be stated in measurable terms. Include process objectives about what will be done (outputs) and outcomes-based objectives that specify what will happen or change as a result.

VI. Methodology

Describe how each of the objectives will be achieved. Provide a detailed plan of the outreach services and methods that will be used during the course of the project, and include expected outcomes. Detail how the project will be implemented, that is, what tasks will be performed and who will perform them.

For training projects, applicants are expected to use or adapt existing training materials before developing new materials. Applicants are encouraged to consult the training materials available in the NN/LM National Training Center and Clearinghouse: <http://nnlm.gov/ntcc/>. If other training materials are developed as part of the project, they should be registered in the Clearinghouse.

VII. Publicity/Promotion

Provide a detailed plan for promoting the project to the targeted populations.

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VIII. Personnel

Identify all project personnel. Include a narrative summary of qualifications as they relate to the statement of work and project responsibilities. Evidence of the Principal Investigator's ability to manage a project of similar scope should be provided. A summary of estimated hours of project work and percentage of total hours worked should be provided for all personnel. Include curriculum vitae or resume for all proposed project personnel. If a position is new and will not be filled by current staff, please provide a detailed job description and minimum qualifications for the position. Preference will be given to bidders with prior experience/knowledge of the target group and experience in providing PubMed, MedlinePlus and Internet training. If the bidder has no prior experience in developing and conducting related programs, indication should be provided concerning the steps that will be taken to obtain adequate background or experience prior to carrying out the project.

IX. Facilities/Institutional Support

Describe the (bidding) institution, its resources and services, as it pertains to the statement of work. Describe the services that will be provided to project participants. Include a letter of commitment from the bidding institution's administration, and letters of commitment from the administration of all libraries and organizations involved in the project. Include a description of how this project will build on other initiatives to improve health information services, if applicable.

X. Schedule

Provide a timeline that outlines the schedule for the delivery of items specified in the statement of work. The schedule must conform to the **Period of Performance**.

XI. Evaluation Plan

Describe the plans for evaluating the project's success in reaching the target group. Evaluation methodologies must be described in full. The evaluation plan should be closely tied to the statement of work and the project goals and objectives. The evaluation should also seek to identify the general health information needs and behaviors of targeted community as observed during the project, and report the usefulness of the information products/services used, especially NLM resources. Anecdotal summaries will be acceptable as appendices to the overall evaluation. Recommendations for future services/products geared toward the targeted community and identification of needs that could not be met should also be included.

For needs assessment and/or evaluation plans, applicants should follow the guidelines established in *Measuring the Difference: Guide to Planning and Evaluating Health Information* and the three supplemental planning and evaluation booklets published in 2006 found on the NN/LM Outreach Evaluation Resource Center website: <http://nnlm.gov/oerc/>.

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XII. Continuation of Activities After Project Completion

Describe intent to continue project services to targeted community after completion of the project. What services will be continued and how will they be funded? Describe any plans for sharing results of the project with participants.

XIII. Other NLM or NN/LM GMR Support

Please list grants/contracts/competitive purchase orders with NLM or NN/LM GMR that were funded previously, are currently active, pending review, or being prepared for submission. Include dates of awards, amount of award, title of project, period of performance and funding agency.

Attachments

- Curriculum vitae of key personnel
- Description of facilities and resources available to the project
- Letters of support from participating institutions and organizations
- Other supporting information

Cost Proposal Instructions

The budget should be broken down into the following categories:

- Personnel
- Travel
- Equipment
- Supplies
- Communications
- Reproduction
- Exhibit and Training Expenses
- Other Costs
- Totals
 - Total Direct Costs
 - Modified Total Direct Costs
 - Indirect Costs
 - Total

For IT/Computer Hardware, please include the following as part of your cost proposal/application process:

For IT/Computer Hardware under \$3,000, submit catalog pricing. List equipment type (printer, scanner, etc.), brand name and model number.

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For IT/Computer Hardware of \$3,000 or more, submit three (3) vendor quotes (preferably valid for 60 days, minimum of 30 days). Quotes may include General Service Administration (GSA) price lists (Reference: <http://www.gsa.gov>). Vendor quotes are necessary to determine price reasonable for purchase of over \$3,000 or more. The absence of competitive quotes must be documented and justified. An institutional policy that outlines preferred vendor requirements is an example of such documentation.

If **Personal Appeal Items** are requested, the following statement must appear in the budget justification:

The recipient of the funding agrees that there is a legitimate purpose for the personal appeal items and use of the items by the Subcontractor(s) will be managed in accordance with policy. Items will not be used in a way that would discredit the NN/LM, the National Library of Medicine and the National Institutes of Health or the applicable Institution.

Applicants are encouraged to provide a separate list of in-kind costs that will be donated by the applicant's institution.

Definitions and Instructions for Budget Narrative Justification

A narrative justification for each expense category in the budget is required. Use the following definitions to guide you:

- **Personnel:** May include professional and support personnel for the project.
- **Supplies:** May include paper, pens, software, and display items.
- **Equipment:** May include rental or purchase of equipment and software.
- **Communications:** May include postage, parcel and other delivery services, and telephone and data line charges.
- **Travel:** May include air travel, ground transportation, parking, hotel, and meals.
- **Reproduction:** May include costs for printing/photocopying of project related materials.
- **Other Costs:** May include honoraria, exhibit fees, or any others items that do not fit into one of the other lines. Please provide a breakdown of what has been included in this category.

Modified Total Direct Costs (MTDC) are calculated by subtracting Capitalized Nonexpendable Equipment from the Total Direct Costs. Overhead (Indirect Costs) are applied only to the Modified Total Direct Costs. The total amount requested is calculated by adding Total Direct Costs to Overhead. If indirect costs are charged, they must be limited to no more than 20% of the MTDC, and must be included as part of the total, not charged in excess of the budget. Total cost for the larger subcontract must not exceed \$40,000. Applicants are discouraged from including indirect costs in the smaller subcontracts.

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Please Note: Funds requested to develop print collections of consumer health materials or to purchase access to any commercial electronic health information product may not exceed 5% of the total amount of the project budget.

Period of Performance

Generally the Period of Performance shall be 18-24 months for the larger subcontracts and 12 months for the smaller subcontracts. See individual RFP for Period of Performance.

Proposal Review Process

Proposals are reviewed by the GMR staff, members of the Regional Advisory Council and, for the larger projects, by the NN/LM National Network Office. Questions and comments from these review bodies may be sent to the applicant for clarification and revision of the proposal. The merits of each proposal will be carefully evaluated, based on responsiveness to the RFP and the thoroughness and feasibility of the technical approach proposed. Applicants must submit information sufficient to evaluate their proposals based on the criteria listed below.

Technical Evaluation Criteria

Specific criteria will be used to evaluate proposals. The criteria are listed on the individual RFPs in the order of relative importance with points assigned for evaluation purposes. Proposals will be scored against these criteria, so be certain that all criteria have been addressed.

Total Points Possible: 100

Proposal Submission Requirements

The respondent should submit one electronic copy (Microsoft Word) and two hard copies of their proposal to:

Ruth Holst, Associate Director
NN/LM Greater Midwest Region
1750 W. Polk Street M/C 763
Chicago, IL 60612-4330
rholst@uic.edu

Do not staple or bind the proposal. Proposals should be submitted in a format suitable for photocopying.

Reporting Requirements

A final report must be submitted in electronic format (Microsoft Word document), suitable for publication on the NN/LM Web site within 30 days of completion of the project. Recipients will be asked

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to report on the experience for *The Cornflower*, the GMR blog, and agree to allow the NN/LM GMR to republish reports and materials. Reports must be submitted to gmr4u@uic.edu.

Quarterly Reports

Quarterly reports will include a brief 2-3 page narrative description of the activities during the reporting period, and the activities planned for the next reporting period.

Reporting Schedule

Quarterly reports are due on the 15th of the month following the end of the quarter as follows:

Table 1: Reporting Schedule

Period Covered	Date Due
May 1 to July 31st	August 15th
August 1 to October 31st	November 15th
November 1 to January 31st	February 15th
February 1 to April 30th	May 15th

Final Report

The Final Report shall be submitted 30 days from the last day of the performance period.

Complete reporting guidelines will be provided to the recipient at the time the subcontract/award is made.

Additional Requirements

Publications Resulting from NN/LM Funded Projects

As of April 7, 2008, final peer-reviewed manuscripts arising from NIH funds must be submitted to PubMed Central upon acceptance for publication. The NIH Public Access Policy (<http://publicaccess.nih.gov/policy.htm>) ensures that the public has access to the published results of NIH funded research. It requires scientists to submit final peer-reviewed journal manuscripts that arise from NIH funds to the digital archive PubMed Central (<http://www.pubmedcentral.nih.gov/>) upon acceptance for publication.

To help advance science and improve human health, the Policy (<http://publicaccess.nih.gov/FAQ.htm>) requires that these papers are accessible to the public on PubMed Central no later than 12 months after publication. The NIH Public Access site should be consulted for additional information: (<http://publicaccess.nih.gov/policy.htm>).

508 Compliance

If a website is developed under this award, the website must adhere to Section 508 compliance. Resources for this compliance include the *National Library of Medicine Web Applications/Site*

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Development Guidelines (<http://www.nlm.nih.gov/web/documentation/index.html>) and Summary of Section 508 Standards (<http://www.section508.gov/index.cfm?FuseAction=Content&ID=11>).

Credit Statement

The awardee shall acknowledge the support of the National Library of Medicine whenever publicizing the work under this award in any media by including an acknowledgment substantially as follows:

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