Date: June 11, 2015

To: All Offerors

Subject: TORP-RMADA-2015-0025: Evaluation of the Oncology Care Model

CMS intends to award a Cost Plus Fixed Fee task order for the subject need in accordance with the terms and conditions of your RMADA IDIQ contract and the attached requirement. The Contracting Officer reserves the right to award any other type of task order deemed necessary. This is anticipated to be a 60 month non-severable effort from date of award through five years thereafter, with two subsequent 12 month option periods.

You are invited to submit a quotation in response to this Task Order Request for Proposal (TORP) based upon the information provided herein:

(1) Attachment A: Statement of Work/Schedule of Deliverables
(2) Attachment B: Quotation Submission Instructions
(3) Attachment C: Past Performance Questionnaire
(4) Attachment D: Evaluation Criteria for Award
(5) Attachment E: Sample Task Order Terms and Conditions

Your attention is called to Attachment B for information on the submission of questions and quotations in response to this TORP.

Please be advised that this TORP does not commit the Government to pay any cost for the preparation and submission of a quotation. In addition, the Contracting Officer is the only individual who can legally commit the Government to the expenditure of public funds in connection with this procurement. CMS anticipates making awards without discussions.

Sincerely,

-S-

John Cruse
Contracting Officer
EVALUATION OF THE ONCOLOGY CARE MODEL

PURPOSE

The purpose of this task order is to conduct an evaluation of the Oncology Care Model (OCM), which is being implemented by the Center for Medicare and Medicaid Innovation (“Innovation Center”), within the Centers for Medicare & Medicaid Services (CMS). OCM is a payment model designed to test the effect of better care coordination, improved access to practitioners, and appropriate clinical care. This task order will conduct an independent evaluation to assess whether OCM achieves better health, improved care, and smarter spending for individuals with cancer who receive chemotherapy.

BACKGROUND

Context

Section 1115A of the Social Security Act (added by Section 3021 of the Affordable Care Act [ACA]) authorizes the Innovation Center to test innovative health care payment and service delivery models that have the potential to lower Medicare, Medicaid, and CHIP expenditures while maintaining or improving the quality of beneficiaries’ care (42 U.S.C. 1315a). Under the law, preference is to be given to models that improve coordination, efficiency, and quality.

For Medicare fee-for-service (FFS) beneficiaries, oncology care is one common and costly area in which specialty physicians manage a beneficiary’s course of treatment. Beneficiaries receiving chemotherapy treatment are among the most medically complex and high-cost populations served by the Medicare program.

In this context, the Innovation Center developed OCM. The model was announced in February 2015, and the model launch is scheduled for April 2016.

The Oncology Care Model¹

The Innovation Center aims to improve the effectiveness and efficiency of specialist care with an episode-based payment model for oncology care. Participants will include physician practices that furnish care for oncology patients undergoing chemotherapy and other treatment for cancer typically managed by a medical oncologist. The clinical management of this group of beneficiaries is complicated by significant fragmentation of oncology patient care.

¹ For more details on OCM, including the Request for Applications (RFA) and other materials, please see: http://innovation.cms.gov/initiatives/Oncology-Care/.
<table>
<thead>
<tr>
<th>#</th>
<th>Task Description</th>
<th>Format</th>
<th>Quantity</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Call agendas and discussion materials for periodic check-in and ad hoc calls</td>
<td>electronic</td>
<td>as needed</td>
<td>2 d. prior to call</td>
</tr>
<tr>
<td>2</td>
<td>Invoice Support/Progress Tracking (see Section G: Contract Administration Data)</td>
<td>electronic</td>
<td>84</td>
<td>Monthly</td>
</tr>
<tr>
<td>3</td>
<td>Project management plan (including organizational chart and staff contact information) (see Section G: Contract Administration Data)</td>
<td>electronic</td>
<td>1</td>
<td>Updated by contractor/shared with COR as requested</td>
</tr>
<tr>
<td>4</td>
<td>Briefing materials for kick-off meeting</td>
<td>electronic, printed</td>
<td>1</td>
<td>Draft: 1 wk. prior to the mtg. Final: 2 d. prior to the mtg.</td>
</tr>
<tr>
<td>5</td>
<td>Kick-off meeting (see Attachment B: Quotation Submission Instructions)</td>
<td>in person</td>
<td>1</td>
<td>2 wk. after date of award</td>
</tr>
<tr>
<td>6</td>
<td>Kick-off meeting summary</td>
<td>electronic</td>
<td>1</td>
<td>Within 2 wk. of the mtg.</td>
</tr>
<tr>
<td>7</td>
<td>Briefing materials for annual meetings</td>
<td>electronic, printed</td>
<td>6</td>
<td>Draft: 2 wk. prior to the mtg. Final: 1 wk. prior to the mtg.</td>
</tr>
<tr>
<td>8</td>
<td>Annual meetings</td>
<td>in person</td>
<td>6</td>
<td>7, 22, 34, 46, 58, and 73 mo. after OCM model launch</td>
</tr>
<tr>
<td>9</td>
<td>Annual meeting summaries</td>
<td>electronic</td>
<td>6</td>
<td>Within 2 wk. of the mtg.</td>
</tr>
<tr>
<td>10</td>
<td>Evaluation design report</td>
<td>electronic</td>
<td>1</td>
<td>Draft: 2 mo. after award Final: 2 wk. after COR comments Updates: monthly, as needed</td>
</tr>
<tr>
<td>11</td>
<td>Primary data collection memo</td>
<td>electronic</td>
<td>1</td>
<td>Within 3 mo. of award Updates: as needed</td>
</tr>
<tr>
<td>12</td>
<td>Primary data collection materials</td>
<td>electronic</td>
<td>TBD*</td>
<td>Draft: 2 mo. prior to fielding Final: 2 wk. prior to fielding</td>
</tr>
<tr>
<td>13</td>
<td>Summary of any pilot testing results</td>
<td>electronic</td>
<td>TBD*</td>
<td>TBD*</td>
</tr>
<tr>
<td>14</td>
<td>Reports describing survey progress to date and any changes to the plan or timeline</td>
<td>electronic</td>
<td>TBD*</td>
<td>Weekly during recruitment and fielding periods</td>
</tr>
<tr>
<td>15</td>
<td>CMS Data Use Agreement and other DUAs, as needed</td>
<td>electronic, printed</td>
<td>1</td>
<td>CMS DUA: 1 mo. after award Other DUAs: TBD* Updates: annually, as needed</td>
</tr>
<tr>
<td>16</td>
<td>Data acquisition plan</td>
<td>electronic</td>
<td>1</td>
<td>Draft: 2 mo. after award Final: 2 wk. after COR comments</td>
</tr>
<tr>
<td>17</td>
<td>Data requests for each data owner</td>
<td>electronic</td>
<td>TBD*</td>
<td>Draft: TBD* Final: 2 wk. after COR comments Updates: as needed</td>
</tr>
<tr>
<td>18</td>
<td>Quarterly reports</td>
<td>electronic</td>
<td>19</td>
<td>Draft: 12, 15, 17, 19, 22, 25, 28, 31, 34, 37, 40, 43, 46, 49, 52, 55, 58, 61, and 64 mo. after OCM model launch** Final: 2 wk. after COR comments</td>
</tr>
<tr>
<td>19</td>
<td>Briefing memo</td>
<td>electronic</td>
<td>1</td>
<td>Draft: 8 mo. before the end of OCM's performance period Final: 2 wk. after COR comments</td>
</tr>
<tr>
<td>#</td>
<td>Task</td>
<td>Description</td>
<td>Format</td>
<td>Quantity</td>
</tr>
<tr>
<td>----</td>
<td>------</td>
<td>--------------------------------------------------</td>
<td>-------------------</td>
<td>----------</td>
</tr>
<tr>
<td>20</td>
<td>4</td>
<td>Baseline report</td>
<td>electronic, printed</td>
<td>1</td>
</tr>
<tr>
<td>21</td>
<td>4</td>
<td>Annual reports</td>
<td>electronic, printed</td>
<td>5</td>
</tr>
<tr>
<td>22</td>
<td>5</td>
<td>Delivery of data files and documentation to CMS</td>
<td>electronic, printed</td>
<td>1</td>
</tr>
</tbody>
</table>

NOTE: Any changes in this schedule must be approved by the COR in advance. * The Contractor shall propose quantities/due dates for these deliverables based on its evaluation design. The final quantities/due dates are subject to approval by the COR and shall be documented in the Work Plan (see Task 1) and Evaluation Design Report (see Task 3). ** The first quarterly report shall focus on the OCM implementation experience during the first OCM performance year. Subsequent quarterly reports shall focus on episodes grouped by OCM quarters. For example, the second quarterly report shall include quantitative findings for episodes initiating during OCM’s first quarter, and shall be due 6 months after the episodes end to accommodate 3-months claims run out, data analysis, and reporting. The third quarterly report shall include findings for OCM first and second quarter episodes, and shall be due 5 months after the second quarter episodes end. Subsequent quarterly reports shall include an additional quarter of OCM episodes at a time, and each shall be due 4 months after the episodes end. The length of time to prepare quarterly reports decreases over these initial quarterly reports to reflect the Contractor’s ability to streamline report preparation over time.
Attachment B—Quotation Submission Instructions

1. Questions concerning this TORP shall be submitted in writing via electronic mail to alex.jarema@cms.hhs.gov no later than 10:00am, local time, June 18, 2015. Questions shall be submitted as a Word attachment to an electronic letter and shall reference the particular section of the TORP for the question. All relevant and timely questions will be addressed to solicited parties and will be conveyed to all Contractors via e-mail by a timely manner to allow for a submission.

2. The quotation shall be submitted no later than 10:00 a.m. local time, Baltimore, MD on July 21, 2015.

For resource planning purposes, offerors are requested to submit ‘an intent to propose’ notification to the attention of the contract specialist. The intent letter should be provided to the contract specialist, Alex Jarema, at alex.jarema@cms.hhs.gov no later than 10:00AM local time, Baltimore, MD, June 25, 2015. The intent to submit a proposal is not binding and will be relied on by the Government for planning purposes only. Submitting a negative response or no response does not preclude an offeror submitting a proposal.

3. The quotation shall be prepared in two parts – written technical information and a business quote (including attachments). Each of the parts shall be separate and complete in itself so that evaluation of one may be accomplished independently of the other. However, resource information such as data concerning labor hours and categories, materials, subcontract, etc., shall be contained in the technical quotation so that the understanding of the scope of the work may be evaluated. In developing quotations, offerors shall assume a task order award date of September 1, 2015. In an effort to “think green” both the technical and business quotation shall be submitted in electronic form only to:

   Alex Jarema
   alex.jarema@cms.hhs.gov

   and

   Larisa Strawbridge
   lara.strawbridge@cms.hhs.gov

For the purpose of establishing timely receipt of a quotation, the time will be established based upon the electronic copy submission.

   a. The technical submission shall be in the following format:
Offerors must respond to all aspects of the Statement of Work as presented in the request for quote. To facilitate quote review and evaluation, the offeror shall submit as part of the quote. The quote shall cover the following:

1 - Statement of Contract Objectives and Technical Approach
2 - Personnel Qualifications
3 - Management Plan and Facilities
4 - Past Performance of the Organization

1 - Statement of the Contract Objectives and Technical Approach

The offeror shall make a clear and concise presentation of the technical approach chosen for this task order. This must be complete and cover all aspects of the scope of work. The offeror should provide sufficient detail in the quote to indicate a technical understanding of and capability of performing the requirements of the scope of work. Quotations that merely restate the requirements in the scope of work without providing substantive descriptions of the planned requirement will be considered technically unacceptable. The offeror should identify a detailed, articulate, and feasible plan to account for the research design considerations outlined in the scope of work.

2 - Personnel Qualifications

This section shall describe the educational background, professional experience, and special qualifications that directly relate to the proposed task order of all professional personnel involved. When consultants or subcontractors are to be employed, the offeror must include their special qualifications, educational background, and experience. The quotation shall specify how the personnel employed under this contract will be integrated organizationally, their proposed responsibilities, and the percentage of time under the contract.

The authors of the quote must be identified. It is to the bidder's competitive advantage if they are the same persons who will carry out the contract, if awarded. CMS deems this procedure necessary to ensure that the capability demonstrated by the thought and substance of the quote will be applied to the study.

Specific topics to be addressed in this section, for key personnel, include:

• A description of anticipated functions and duties with respect to this task order.
• A brief description of relevant training, and experience
- Specification of anticipated degree of availability for the Task Order period, i.e. any other work that might constrain the availability and at what times.
- A description of the formal relationship between the individual and the contractor (for example, employee, employee of subcontractor, consultant).

3 - Management Plan and Facilities

Each offeror shall provide a Project Management Plan with resource information, such as data concerning labor hours and categories, materials, and subcontracts. The management plan shall indicate all tasks that will be subcontracted and how subcontracted work will be monitored. Lines of communication between the contractor, CMS, and subcontractors are to be carefully considered in the project organization. The quote should demonstrate a well-developed approach for ensuring successful completion of this project.

CMS has identified a potential conflict of interest, were the same contractor to be awarded this task order as well as the Oncology Care Model Implementation and Monitoring task order. If the offeror submits quotations to both TORPs, it shall provide sufficient detail to demonstrate that there is either (a) not a conflict or (b) it has a mitigation plan in place to prevent a conflict of interest.

4 - Past Performance

Definitions:

Relevant – Relevant past performance information is described in FAR 42.1501, General. For the purposes of this solicitation, ‘relevant’ is also past performance information which is similar in size, scope and complexity to this contract.

Significant Subcontractor – A subcontractor performing major or critical aspects of the requirements relevant to the prospective contract.

Instructions:

The Offeror and all its significant subcontractor(s) identified in the proposal are required to provide a summary to disclose all of the following for the past performance information with a period of performance end date within the last 3 years of the date of this solicitation:
1. All CMS contracts/task orders greater than the simplified acquisition threshold
2. All relevant contracts/orders entered into with:
   - Other Federal Government Agencies,
   - State Agencies,
   - Local Governments, and
   - Commercial Customers

The Offeror’s and proposed significant subcontractor(s) summary shall provide the following information.
1. Customer or Agency
2. Contract number (if applicable);
3. Point of Contact (Contracting Officer or other for Commercial Contract);
4. Approximate total contract value;
5. Contract period of performance, by base and option year(s);
6. Description of contracted services/supplies; and,
7. Relevant (Y/N)
   - If the past performance is relevant, how the disclosed contract’s past performance information is relevant to the subject solicitation.
8. Additional Info: If performance was documented as less than satisfactory, the Offeror shall provide a summary of the identified issues, steps taken to resolve the problem and processes in place to improve future performance.

The below table should be used when providing a summary of the past performance information:

<table>
<thead>
<tr>
<th>Customer (Agency)</th>
<th>Contract #</th>
<th>POC</th>
<th>Total Contract Value</th>
<th>Period of Performance</th>
<th>Description of Services/Supplies</th>
<th>Relevant (Y/N)</th>
<th>Additional Info</th>
</tr>
</thead>
</table>

Offerors and proposed significant subcontractors without relevant Federal Government past performance experience may ask customers to submit no more than three (3) Past Performance Questionnaire (PPQ) for the same or similar work directly to the Contracting Officer (See Attachment C). It is the responsibility of the Offeror to ensure timely return of any/all PPQs to the Contracting Officer in accordance with the proposal due date and time established within this solicitation. Contracts may include those entered into with the State/Local Governments and/or commercial customers.

b. Business Portion
The business submission shall be submitted separately and should include costs broken down by tasks, key personnel and time periods itemized by year (if applicable). The business portion should also include any subcontractor costs associated with any subcontractors proposed in the technical portion. A breakout of the subcontractor costs is required. Other direct costs, including travel, should also be included.

The business submission shall include pricing for the following kick-off meeting deliverable:

Kick-Off Meeting

The contractor shall participate in an initial meeting with CMS technical and contracting personnel to ensure that there are no ambiguities in the requirement and to discuss the terms and conditions of the order. This is an opportunity for the contractor to discuss its use of the PMP as proposed. It is anticipated that this meeting will take place within 15 days of task order award so as not to delay the commencement of the work. Offerors shall propose either teleconference or other virtual means or a face-to-face meeting and shall price accordingly.

Please note: Section H.6, CMS Security Provisions, should not be considered in determining the costs for this project. CMS is responsible for any costs associated with the Security Provision.

Please note: Sub-contractors too, must have an adequate accounting system that has been previously audited by another Federal Agency if a cost reimbursement type of contract is considered. If proof is not immediately available, the prime must evaluate a firm fixed priced type of contract.