

Attachment #3: PICSII SAMPLE Task Order Exercise

This exercise has been created solely for purposes of responding to an NIH solicitation. The following elements are included here solely in an effort to provide the Government with an idea of individual firm capabilities in—and approaches to—a number of representative task areas outlined in the PICSII RFP. The exercise does not represent an actual Federal programmatic effort, nor does it reflect the Government’s intention to conduct such a program, nor does it imply or state endorsement of any treatment or prevention approach to a health condition or disease. **Potential offerors are therefore instructed not to execute outlined deliverables and work.**

For purposes of preparing responses to the RFP and outlining approaches to required work, this exercise represents a **12-month-long contract commencing in early October of a non-specified fiscal year**. For this exercise, the possibility of option years or no-cost extensions should not be assumed in pricing individual tasks and deliverables and preparing a response.

PICSII SAMPLE Task Order EXERCISE

ORGANIZATION

National Institutes of Health
Office of Communications and Public Liaison
Office of the Director
Bethesda, Maryland 20892

This sample exercise is for the provision of communications services related to a Federal research program on the human microbiome: the complex and dynamic system of microbes living on and inside of our bodies. Products and materials produced over the span of the contract include lay articles, scientific articles, factsheets, backgrounders, science education and training materials, presentations, events materials, social media content, toolkits and curricula, audiovisual clips, Web content, information used in outreach efforts, lists of specialized or general media contacts, images and graphics, and other deliverables. The exercise assumes that offerors (“Contractor”) may opt to take advantage of teaming arrangements, partnerships, subcontracting agreements, or consultancy agreements.

BACKGROUND (INTRODUCTION)

Microbes are now thought to play a role in human health with particular reference to digestion. Contemporary news reports and the scientific literature continue to feature stories concerning the microbiome’s potential role in maintaining human health. This exercise outlines component requirements for a publicly-funded research awareness program requiring a wide range of original communications products and services, all related to the human microbiome.

PERIOD OF PERFORMANCE

The pricing exercise assumes a 12-month project that begins in early October of an unspecified fiscal year. A schedule and timeline for work and deliverables appears at the conclusion of the exercise outline and is included to assist offerors in pricing work to be accomplished.

TASKS/SERVICES

Contractor shall provide the following services further described in a schedule of deliverables that appears at the end of this outline:

Task 1. Communications Research

Contractor shall undertake an initial, background research effort (i.e., independently researching, gathering, compiling, analyzing, and interpreting science- and health-based information) from which a variety of materials are to be produced. Contractor shall initially assign 1-2 staff persons, for example a science writer and a junior-level researcher, to identify, retrieve, and prepare information. Materials

shall originate from printed or Web-based media, libraries, Federal agencies, nonprofits, professional societies, environmental scans, bibliographies, reading lists, and notes, and other outlets. Contractor may elect to (a) subscribe to or obtain access* to any useful or beneficial resources as required, and (b) make recommendations to the program office concerning the utility and benefits of appropriate subscriptions. Whenever possible, the Government shall share any relevant materials available to it with the Contractor as allowed and appropriate. Contractor shall prepare, transmit, and archive a research summary transmitted to the program office as an email sent twice a month (at a minimum). The work of the contractor should facilitate continuation of these efforts by the Government beyond the conclusion of the contract year.

* Assume a budget of \$700

Task 2. News Media Operations Support

Contractor shall research, compile, maintain, and revise revision of specialized press lists and directories of lay and scientific media outlets relevant to the project, including lists of any relevant travel, nutrition, health, and wellness magazines; women's magazines; other target newspapers, newsletters, and magazine contacts (e.g. *Prevention*); television contacts (e.g., Dr. Oz); contacts at health and lifestyle online outlets; and key social media outlets. The goal is to identify a subset of media outlets collectively considered to be a core audience.

- Press lists should include complete contact information for use by program office, including the name of the media outlet, the name and email address for NIH's editorial contact(s), a street or 'snail mail' address, telephone number(s), and a URL.
- Beginning in October, Contractor shall also use in-house staff or subcontracted or partnered assistance to research, compile, revise, and transmit daily trade and lay press clippings relevant to the program goals. Clippings shall be divided into a number of separate sections for organized by outlet type: major media, trade press, etc. Contractor shall format and transmit clips as a single morning email directed at the program office no later than 10:00 a.m. ET. Transmission should include URLs for source articles and a 10-20 word summary of each clipping. Contractor shall also attach an identical set of clippings formatted in Word.
- Contractor shall also maintain archived records of all clippings compiled and in such a way as to facilitate on-demand transmission. The archive shall also be furnished to the NIH at the conclusion of the entire program, organized by date, author, journal or another agreed-upon approach.
- Contractor is also encouraged to monitor and track scientific progress about the human microbiome over the span of the contract using health, medical, and scientific news as a source. The goal is to suggest and advise the Government's points-of-contact on potential features and social media posts (e.g., tweets, blog posts).

2b. Media and Crisis Communication Training

Contractor shall conduct two (2) half-day media training sessions for six (6) scientific staff persons, three (3) individuals each session. The purpose of the training is to train scientists in preparing to speak with the media about the human microbiome and NIH research. Each participant shall receive a set of training materials. Contractor shall furnish all requisite supplies, training materials, and equipment.

Contractor-involvement in all sessions shall be executed with complete confidentiality and extreme discretion. The sessions will be held during business hours in November and March.

Task 3. Audience Outreach and Promotion

Contractor shall develop a plan for outreach and promotion for the awareness effort, taking into effect the current budgetary environment to which the Government may be subject, as well as any ethical considerations that might affect potential partnerships and other communications approaches. This may preclude the involvement of commercial entities, e.g., companies with an interest in marketing wellness products. Planning efforts at a minimum should incorporate a number of approaches for engaging the public. The deadline for finalizing this task is mid-November. The task includes:

- Development and design of a colorful, engaging, self-subscribing e-newsletter (see **Task 4**, “*Misc. Writing*”) for regular transmission, i.e., once or twice a month. The first e-newsletter should debut in December. The goal is to update readers about research, funding opportunities, opportunities for public participation, new resources, events, and other news.
- Development of a distribution plan for e-newsletter recipients. The plan should note—and take advantage of—existing NIH approaches (e.g., syndication) and novel approaches, including exhibit opportunities appropriate for a Federal agency to undertake (e.g., the Smithsonian, associations of science teachers, national STEM events and competitions);
- Identification of potential additions to the Government’s existing stakeholder lists, focusing on compilation of individuals and directories drawn from nonprofits; the media; industry; academia; scientific, educational, professional societies; and others; and
- A social media plan outlining potential outlets and approaches for reaching new audiences.

3b. Outreach to Target Populations/Health Disparities Programs

Contractor shall participate in an initial meeting three (3) weeks into the contract period to discuss outreach to agency audiences and communities. The goal of the meeting is to establish a plan and highlight opportunities for outreach. Discussion points include: identification of potential outreach goals and audiences; possible creative approaches to development and production of required materials; refinement of messages; initial development of a program timeline; identification of national or community events (such as health fairs and wellness events); and formulation of potential audience-appropriate messages for use in community education and wellness efforts.

Task 4. Materials Development

Contractor shall prepare and finalize a series of high-quality products and materials, specifically:

- A communications approach (“look”) with potential slogans, taglines, messages, and other branding elements compatible with and complementary to the Government’s existing brand and trademarks. Contractor shall provide the Government with a number of approximately three (3) design options

from which to choose. Designs will be subject to revision and refinement with a deadline for final selection set for November 30.

- A basic template and slide set numbering approximately twenty (20) slides constituting a basic introduction to the human microbiome, focusing on NIH research (i.e., “Microbiome 101”). In developing slides, Contractor shall work off of agency-furnished source material. Slides will undergo frequent revision and may require Contractor to purchase images (6-12) from a stock photo company and obtain liberal permissions for extended use (i.e., on the Web, in internal publications, and in slide presentations used by agency scientists). Whenever possible, full ownership is desired. All materials shall complement the program’s overall look and feel and are subject to NIH approval prior to final production. The deadline for the slide deck is mid-December.
- Contractor shall be responsible for producing basic factsheet on the human microbiome, designed and produced as a full color brochure and printed on high-quality stock, 8-10 pages in length. Government shall work with Contractor to develop basic draft copy. Copy may undergo 1-2 revisions before being finalized for production. Contractor is encouraged to adopt creative approaches to the task, providing the Government with three (3) design options from which to choose, but the deadline for final factsheet copy, ready for production, is the end of January. Target production: 5,000 copies.
- Contractor shall develop, design, and produce an entertaining, engaging, colorful, full-page teaching guide for use by teachers aimed at helping young people understand the importance of good nutrition and healthy digestion. Product may be realized as a coloring book, cartoon book, puzzle, curriculum guide, or other approach as appropriate. It may also incorporate a workbook, handout, or other resource for use by teachers in communicating with students. The deadline for final guide copy, ready for production, is the end of January. Target production: 5,000 copies.
- Contractor shall work with the Government’s team to research, draft, revise, refine, finalize, design, and produce a full-color scientific report outlining progress-to-date in NIH research on the microbiome. An example of such a report is the agency’s Alzheimer’s disease report at <https://www.nia.nih.gov/alzheimers/publication/2014-2015-alzheimers-disease-progress-report/introduction> . Contractor shall work from draft sections and source material, organizing text and incorporating revisions and changes for approval. Contractor shall also inventory any Government-furnished images, charts, graphics, licenses, and credits. Contractor will also have to purchase six (6) stock images with liberal usage rights or full ownership (preferred). Contractor shall design four (4) health-related illustrations with input from NIH staff, one a detailed, scientific image. For the report, Contractor shall provide the Government with 3 cover design options from which to choose and may be required to participate in monthly, hour-long meetings with scientific program staff to prepare copy and design. The deadline for final copy, ready for production, is March with a target production run of 5,000 copies.
- A printable, legal-size infographic developed for the Web consisting of six (6) elements: two (2) primary and four (4) secondary components. Two (2) primary components will address the microbiome directly, focusing on nutrition and genetics. Four (4) smaller components will be of a statistical nature, along the lines of graphs, pie-charts, or statistics. The infographic shall be produced in B&W with no fewer than 3 additional colors drawn from the program’s overall look to be incorporated into the design. Contractor shall provide the Government with three (3) design options from which to choose. Item will not be printed, but the final size should facilitate printing as

standard-size copy (i.e., as a .PDF). Drafts may undergo 1-2 revisions before being finalized for production. The deadline for final infographic copy, ready for production, is February.

- A small, mail-ready card or oversized bookmark designed to convey basic information and illustrations about the human microbiome. The card will be executed in B&W with three additional colors to be incorporated drawn from the program's overall look (as selected in late November). The reverse side will include the NIH logo and tagline and other suggested elements (e.g., URLs, QR codes). Contractor may adopt creative approaches to sizing, e.g., preparing the product as a bookmark or card. Contractor shall provide the Government with three (3) design options from which to choose. Copy shall undergo 1-2 revisions before being finalized for production. The deadline for final card/bookmark copy, ready for production, is the end of January. Target production: 5,000 copies.
- An exhibit and banner (Task 8) and a website (Task 10b).

Contractor shall furnish Government with a Section-508 compliant PDF of each product developed as possible.

Misc. Writing

Contractor shall also furnish a science writer to support the Government's need for the following:

- Regularly scheduled meetings or teleconferences with project team staff to take place monthly over a 6-months then tapering off to once a month, a total of 18 meeting summaries over the course of the contract period. Contractor shall make a record of meeting discussions and furnish the Government with a brief (1-2 page) summary of each meeting. Each summary may require revision before final approval by the Government.
- A self-subscribing e-newsletter (see description under **Task 3**) designed to alert readers to new findings, grant opportunities, opportunities for public input, available resources, and upcoming events. Contractor shall work from Government-furnished source information to produce copy but may be required to create some new copy (e.g., news updates, occasional news briefs, photo captions, and short features). All draft materials are subject to revision and refinement prior to finalization. The newsletter should reflect the overall look of the program and is scheduled for launch in December.
- Two (2) draft stories appropriate for *NIH News in Health* as instructed by *NIH News in Health* editorial staff. Each article shall address a current health topic, e.g., nutrition, digestion and include a "Wise Choices" box of action-steps, a total of 600-800 words in length. Articles are subject to multiple-IC clearance and require author(s) to interview an NIH staff member as directed and arranged by editorial staff. Articles are subject to 1-3 revisions and must meet *NIH News in Health* style standards. Deadline: two (2) stories over the course of the contract year.
- A senior-level writer assigned to produce the scientific report outlined due in March (Task 4).
- A writer assigned to prepare a summary of the early June workshop due no later than 2 weeks following the event (Task 9).

Task 5: Graphic Design

Contractor shall produce and provide original artwork, typography, and production support sufficient enough to produce a number of high-quality materials on short turnaround as outlined under specific task areas. Deliverables include:

- A visual communications approach to the program or overall “look” (see Task 4).
- An e-newsletter reflecting the program’s look (see Tasks 3, 4 “*Misc. Writing*”).
- The slide set and slide template reflecting the program’s look (see Task 4).
- A basic factsheet (see Task 4) – 5,000 copies.
- A teaching guide (see Task 4) – 5,000 copies.
- A mailer card or bookmark reflecting the program’s look – 5,000 copies (see Task 4).
- A full-color scientific report outlining progress-to-date in NIH research on the microbiome—5,000 copies. Report includes purchase of six (6) stock images with liberal usage rights and design of four (4) health-related illustrations and 3 cover design options (see Task 4).
- A printable infographic for the Web, also reflecting the program’s look (see Task 4).
- A pull-up banner and tabletop exhibit (see Task 8) reflecting the overall look of the program.
- Workshop and other events materials (see Task 9).
- A website devoted to NIH microbiome research (see Task 10b).
- Section 508 compliant deliverables as outlined and required.

Task 6: Foreign Language Translation and Interpretation

Contractor shall make available to the Government—through staffing, subcontracted agreements, or novel teaming and partnership arrangements—translation and interpretation capabilities. Contractor shall provide the Government with:

- Spanish-language translations (text only) of the project’s factsheet, teachers’ guide, and mailer card/bookmark.
- Spanish-language translations of specified *NIH News in Health* articles (text only).
- Monthly (18 total) Spanish-language translations of 1,000-word, research-based articles designed for publication as web content (text only).

Task 7: Information and Referrals (“Clearinghouses”)

Contractor shall set up a clearinghouse for distribution of program materials. The deadline for *initial* clearinghouse set-up is no later than the end of January, when printed materials begin to arrive. A dedicated toll-free number is not required nor is a high volume of calls expected. Contractor shall take receipt of printed materials and products from printers for central distribution in the call center. Inquiries may stem from telephoned or written requests or requests may be forwarded from the Government’s office(s). For inquiries, Contractor assist in drafting language to be used in correspondence with dissemination efforts. For photocopied materials, Contractor shall produce clean, evenly produced copies. Contractor shall use established, reliable, courier, delivery, and express delivery mechanisms. **See delivery summary at end.** Specific deliveries to be made are:

- Contractor shall handle a nationwide mailing of a letter to 4,000 teachers informing them of the availability of the teaching guide. Contractor shall draft and finalize a letter and use a Government-

furnished mailing list. Contractor shall also handle a mailing of 2,500 libraries slated to receive the factsheet and mailer card. Both mailings should be completed by the end of March.

- For separate STEM events, 50 copies of the factsheet and bookmark/card and (1) one copy of the teachers/curriculum guide shall be sent to schools in Rockville Maryland; McLean, Virginia; and Annandale Virginia. Materials must be received by mid-morning. Government shall furnish Contractor with full contact information. The events are in April.
- For the annual USA Science Festival on the Mall event, scheduled for the Convention Center in April, Contractor shall handle delivery of 1,000 copies (each) of the factsheet and small card and 500 copies of the teaching guide. The delivery will also require transport of either the newly produced banner or exhibit (see Task 8). **See delivery summary at end.**
- Contractor shall maintain a clearinghouse inventory of 4,000 copies of the scientific progress report available for distribution from the Contractor's facility. The 1,000 remaining copies of the scientific progress report shall go to the Program Office on the main NIH campus.
- An inventory of 500 copies of the teaching guide and 50 copies of the factsheet and mailer card/bookmark are to be delivered separately to the Program Office on the main NIH campus to be held in reserve there. **See delivery summary at end.**
- Approximately 100 copies of the factsheet and bookmark/card will be required for an on-campus STEM event in June (see Task 9). **See delivery summary at end.**

Postage and Supplies: Contractor shall furnish supplies and materials used in disseminating materials, e.g., boxes, envelopes, labels, stationary. For U.S. mail deliveries, Contractor may use NIH-furnished, franked, Government-furnished envelopes, but all pieces are to be delivered ready for mailing at the mail facilities in Montgomery County, Maryland. At the conclusion of the contract, any leftover materials shall be returned to the Program Office or another designee on campus. Any remaining surplus is to be held as an inventory in the Contractor's facilities. **See delivery summary at end.**

Task 8: Exhibit Development, Design, Production, and Transport

Contractor shall produce an easily portable (by hand) tabletop exhibit and pull-up banner concerning NIH human microbiome research efforts. Both should reflect the overall look of the program. For each exhibit, Contractor shall provide the Government with three (3) design options from which to choose. Each design shall display the NIH logo, a list of participating ICs, links to 2-3 relevant NIH resources, photos already purchased for other program component products, and an introduction to basic concepts about the human microbiome. The exhibit and banner designs should be ready by the end of March, in time for spring-summer events. **See delivery summary at end.** Contractor shall transport:

- Exhibit-related materials for the NIH's exhibitor presence at the USA Science Festival on the Mall, held annually in April at the DC Convention Center. This includes delivery of either the banner and exhibit and 1,000 pieces of both factsheet and card, as well as 500 copies of the teaching guide. Delivery must take place in the evening on a designed weeknight as directed by the expo company.
- Delivery of either the new exhibit or banner and 100 copies of the factsheet and mailer card for a STEM open house scheduled on-campus in early June (see Task 9).

Task 9: Meeting, Conference, and Event Support

Contractor shall arrange for appropriate room reservations for a one-day research workshop on the microbiome to be held on the NIH campus with the participation of 100 persons. Contractor shall provide staffing and requisite signage, including three (3) foam-core mounted signs and ancillary registration center supplies and materials. The workshop will take place from 10:00 a.m. to 3:00 p.m. ET in early June. The Government anticipates a need for two (2) contracted staff persons to:

- a. Deliver materials and exhibit cases to campus;
- b. Set up delivered tabletop or banner exhibits and set up and staff the registration table;
- c. Furnish 100 personalized, fully assembled nametags;
- d. Prepare (copy, collate, staple, and finalize) 100 participant packets, including event agenda, 2 pages of bios, and a 10page scientific article (about 20 pages total) in Government-supplied folders.
- e. Coordinate logistics (e.g., scheduled breaks, table tent changes, packet production);
- f. Serve as liaisons between event principals, speakers, and Events Management staff, including audiovisual technicians; and
- g. Coordinate requests for local transport (taxicabs).

In addition, Contractor shall supply a senior-level science writer to oversee transcription of the event and preparation of a post-event summary, due for final dissemination no later than 2 weeks after the event. Government shall furnish a table, chair, and time-coded digital recording for use by the contractor. The summary shall be subject to revision and final approval. Final summary shall be delivered within two (2) weeks of the event.

Contractor shall handle travel arrangements for one (1) meeting principal, a Texas-based scientist invited to speak. He will overnight to Bethesda the evening before the workshop. The scientist will arrive the night before the meeting, overnight the night after the meeting, and leave the afternoon of the day after the meeting. On that day, he will attend morning meetings with scientific program staff located in off-campus NIH offices (Rockville). The scientist will need to be based near the NIH campus in a Bethesda or Rockville hotel. All travel arrangements are subject to Federal travel regulations, including allowable expenses. He will also need assistance with ground transportation (information). He will not receive a per diem or honorarium.

Following the workshop, several workshop principals will make a special appearance at a STEM open house where they will greet visiting students who are touring the NIH campus with. The NIH requires Contractor to set up and staff a welcome table with the program's newly developed exhibit or banner and greet students. NIH visitor services staff will handle logistics for this event and ICs will offer their staff and materials to meet with students. In addition, 100 copies of the factsheet and mailer card will be used at the event.

Task 10: IT Requirements

Contractor shall furnish all staffing, equipment, materials, and expertise sufficient to accomplish the Government's IT goals in executing outlined program tasks. Whenever possible, electronic and information technology procured through this effort must meet the applicable accessibility standards in keeping with Section 508 of the 1973 Rehabilitation Act at <http://www.section508.gov>. See specific Tasks, e.g., 4, 5 for 508 products to be developed.

b. Web Design, Development, and Management

Contractor shall work with the Government's team to develop, design, refine, finalize, test, and launch a website* devoted to NIH research on the human microbiome. Examples of this type of website are the *National DNA Day* website at <http://www.genome.gov/DNA Day/> and the *Safe to Sleep* website at: <https://www.nichd.nih.gov/sts/Pages/default.aspx>, as well as the NIH Impact website at: <https://www.nih.gov/about-nih/what-we-do/impact-nih-research>. Content should be appropriate for a wide range of visitors, including but not limited to scientists, nonprofits, students, Industry, and others. Contractor's team will be involved in all aspects of website development, collaborating with NIH staff on design and technical requirements. The Government shall furnish Contractor with an array of templates to be used. As part of this task, the Government may require periodic, *ad hoc*, on-site support from a senior web staff member over a period of one month. The Government shall arrange for this individual to have required access and permissions. Site files should be delivered to the Government upon launch (May). Contractor shall update content over the span of the contract period, including creation of new content and refinement of existing content. The Government also anticipates a need for Contractor support in developing a site promotion plan and second-phase site planning, the latter designed to incorporate site enhancements, refinements, and additional features. Contractor shall also provide brief but informative monthly analytics reports following the site's launch in May.

* For purposes of pricing, assume development in Drupal or Dreamweaver

c. Preservation, Cataloging, and Storage of Web-based and Other Digital Content

Contractor shall develop and set-up a system for inventorying and cataloging as many as 200 scientific images relevant to the Project. The system can be as simple as an Excel spreadsheet or it may employ a more complicated approach, such as the use of off-the-shelf programs, customized approaches, or the development of a Flickr site to complement and expand the agency's existing gallery. The resource should be designed for use by the program office in responding to requests for photos from the media and broader public. It will contain images, graphics (e.g., infographics and illustrations), audiovisual clips, and other graphic content related to the program. Contractor shall work with NIH to caption and tag each graphic. Additional, relevant information shall include references to any subjects portrayed in the photo, permissions obtained (e.g., credits, copyrights), photo tags, and source material. Initial planning for the system, ready for incorporation of images, should be completed by the end of December.

d. Web Site Usability Testing

Contractor shall also furnish all staffing, equipment, materials, and expertise sufficient for accomplishing the Government's requirements. Websites are subject to applicable policies, statutes, guidance, regulations and laws pertaining to Federal websites. Contractor shall assist NIH with the design, operation, management, and maintenance of a program Website and shall perform a range of responsibilities including but not limited to the following: technical site review; content development; accessibility; forward-thinking graphics enhancements; template and design development for better design integration; security and privacy compliance; implementation of safeguards to ensure security and confidentiality of information, data, and equipment.

e. Database Design, Development, and Management

Contractor shall furnish all staffing, equipment, materials, and expertise sufficient to accomplish the Government's goals in executing outlined program tasks. The Government anticipates that several Task

areas will require support for tracking activities, producing summaries, developing and maintaining lists, organizing graphics and image files, disseminating news, and managing inventory and warehouse activities. See outline of requirements under specific tasks.

f. Information Tracking and Referral

Contractor shall furnish all staffing, equipment, materials, and expertise sufficient to accomplish the Government's goals in executing outlined program tasks with particular reference to making referrals and inquiry response, news dissemination, and inventory management and warehousing. See outline of requirements under specific tasks.

Task 11. Inventories/Warehouse/Distribution/Services

For the overall project, Contractor shall also furnish all staffing, equipment, materials, and expertise sufficient for accomplishing the Government's requirements. Materials to be warehoused, secured, protected, inventoried, and transported over the course of the contract include but are shall not be limited to exhibits, publications, supplies and materials, publications, and exhibit cases (not Federal records). The contractor shall provide or ensure access to a storage facility large enough to store the NIH's materials. The facility shall be proximal to the main NIH campus to ensure timeliness in transporting materials between the NIH and the warehouse, post office, and event venues located within the Baltimore–Washington Metropolitan Area. Space devoted to warehousing of the Government's materials and products shall be well lit, clean, dry, and protected against the elements at all times. Contractor shall make all arrangements necessary for appropriate climate conditions and fire and flood prevention and safety and shall have in place adequate replacement insurance for NIH publications and equipment, guarding against damage such as fire, flood, and theft.

Contractor shall provide the NIH with any materials in storage no later than twenty-four (24) hours of any program office request. Contractor shall

- Receive, load, unload, move, and warehouse the NIH's materials and products;
- Manage up-to-date, accurate inventories;
- Store inventoried items in the contractor's own facilities (e.g., offices, warehouses) as directed and required;
- Reconcile physical counts of materials and products against the inventory, producing and furnishing accurate, up-to-date reports on demand;
- Maintaining primary stock levels in warehouse space with secondary (lesser) stock numbers in Contractor's offices for ready access;
- Store additional required program materials and supplies, including but not limited to supplies, exhibits, cartons of publications, production-ready copy and artwork, miscellaneous equipment, audiovisual materials, archived materials; and
- Ship and/or deliver products and materials to and from a variety of locations in the Baltimore–Washington Metropolitan Area, including the Contractor's facilities, postage and shipping locations, Federal offices, other offices, schools, and as convention and exposition venues.

Record-keeping shall extend to shipment information and numbers of items distributed. In addition, Contractor shall provide on demand pick-up and delivery service between Contractor’s facilities, NIH facilities, and off-campus facilities. The NIH anticipates it will require no more than 2-4 deliveries a month to and from campus over the contract year. Required equipment (e.g., hand trucks) shall be supplied by the contractor.

Distribution and Delivery Summary:

Teacher Mailing	<ul style="list-style-type: none"> • 4,000 copies of a Contractor-drafted, approved letter to be mailed by end of March – announces availability of curriculum/teachers guide.
Library Mailing	<ul style="list-style-type: none"> • 2,500-piece library mailing with letter, factsheet, and mailer card/bookmark.
STEM Events	<ul style="list-style-type: none"> • 100 copies of both factsheet and card for the on-campus STEM open house event in June. • 50 pieces copies of both factsheet and card (50 pieces x 3 schools/events) slated for local school STEM events in the spring (April). • One copy of the curriculum/teacher’s guide to be sent to each local school (i.e., 1 copy for each school) for local school STEM events (April).
USA Science Festival Convention Center	<ul style="list-style-type: none"> • 1,000 pieces of both factsheet and card. • 500 copies of the curriculum/teachers guide.
Program Office Reserve	<ul style="list-style-type: none"> • 50 copies of the factsheet and card. • 1,000 copies of scientific report. • 500 copies of curriculum/teachers guide.
Contractor Reserve/Distribution	<ul style="list-style-type: none"> • Surplus copies of factsheet and card to be held in reserve for clearinghouse distribution. • 4,000 copies of scientific report held as reserve for clearinghouse distribution. • All surplus copies of curriculum/teachers guide for distribution in response to teacher mailing.

Month	<p style="text-align: center;"><u>Timeline/Schedule</u> (with corresponding Task Numbers)</p>
October- November	<ul style="list-style-type: none"> • Research effort begins with one or two persons (Jr., Sr. science writers) assigned to conduct background research (see Task 1). May require subscriptions, online access (see <i>Misc.</i> below—assumes a budget of \$700). • Twice monthly (at a minimum) emailed research summary/digest. To continue over contract year (see Task 1). • Media support begins: press list development; development of new, targeted outlets; daily transmission of morning clips with Word attachment; organization of clippings archive to span contract year (see Task 2). • Outreach meeting takes place (3 wks. into contract period) to address development of program timeline and an outline of component activities (see Task 3b). • First of two half-day media training sessions takes place with required materials supplied by contractor (see Task 2B). • Audience promotion plan due by mid-November, including audience/stakeholder development plan, outline of audiences, distribution plan for e-newsletter, social media plan (see Task 3). • Final selection of an overall graphic “look” for the project due for final selection no later than November 30 (see Task 4). • Minutes and 2-page meeting summaries begin, twice monthly for 6 months, tapering off to once a month for a total of 18 summaries (see Task 4, “<i>Misc. Writing</i>”).
December	<ul style="list-style-type: none"> • Slide set design/“Microbiome 101” due by mid-December reflecting the newly approved design for program “look” (see Task 4). • Photo library approach finalized and ready for receipt of images by end of December (See Task 10c). • Launch of e-newsletter (see Tasks 3, 4 plus “<i>Misc. Writing</i>”).
January (end)	<ul style="list-style-type: none"> • Finalize production of factsheet, curriculum/teachers guide, and mailer card/bookmark. Target goal for receipt is end of January with production runs of 5,000 each (see Task 4). • Clearinghouse ready by end of January for receipt and distribution of printed materials and set up for inquiry response (see Task 7 and delivery chart), especially response to 4,000-piece teachers mailing.
February	<ul style="list-style-type: none"> • Finalize 508-ready Web infographic due, reflecting overall look of the program (see Task 4).

March-April	<ul style="list-style-type: none"> • Final scientific report due in March with a target production run of 5,000 copies. Report requires senior-level writer; purchase of six (6) stock images with liberal usage rights; and design of four (4) health-related illustrations and 3 cover design options (see Task 4). Task requires participation in monthly meetings/calls (1 hour each). • March: second of two half-day media training sessions to take place with required materials supplied by contractor Task 2B). • Library (2,500 ct.) and teacher (4,000 ct.) mailings scheduled for March (see Task 7 and delivery chart). • Production of exhibit and banner due at end of March (see Task 8). • Three STEM (science education) events scheduled for local schools with associated deliveries (see Task 7 and delivery summary). • Exhibit delivery at Convention Center for the USA Science Festival with associated materials (exhibit(s), 1,000 copies of factsheet and card, 500 copies of teaching guide). See Task 7 and delivery summary.
May	<ul style="list-style-type: none"> • Website* launches, files scheduled for transfer and a seamless transition from Contractor to the NIH (See Task 10b).
June	<ul style="list-style-type: none"> • One-day scientific workshop and STEM open house scheduled for early June with required materials associated for 100 persons plus, post-event transcription/summary to come 2 weeks later. See Task 9.
July-October	<ul style="list-style-type: none"> • E-newsletter and news dissemination • Background research (continues/ongoing)
Misc.	<ul style="list-style-type: none"> • Subscriptions required for Task 1: Assumes a budget of \$700. • News story development for <i>NIH News in Health</i> (2 instances, 600-800 words each, includes interviews (see Task 4, “Misc. Writing”). • Writing support for monthly project team meetings (See Task 4, “Misc. Writing”). • Development of a website promotion plan and second-phase site planning (see Task 10b). Provision of periodic analytics reports over the summer after site launches in May. • Translated items (see Task 6). • Section 508 equivalents of any deliverables produced (see Task 4, end of section). • Delivery and courier costs (see Task 11) –assumes 2-4 deliveries/mo. to and from campus over the contract year plus specified deliveries (e.g., Convention Center). • Insurance, e.g., for warehouse facilities (see Task 11).