


# ISTA Advocate Research & Value Delivery Program

		<h2>Request For Proposal</h2>	
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TITLE Distribution Environment Data Collection Phase 1: Global Observational Study of Packaged-Product Handling, Transportation and Storage			

## SCOPE OF THE PROPOSED RESEARCH PROJECT

The International Safe Transit Association (ISTA) on behalf of the members of its Advocate Research & Value Delivery Program (ARVD) is going to conduct research on different distribution scenarios in order to validate existing data and add additional transport distribution environment data from other regions to its Data Depot. With the current makeup of ARVD member companies in mind, and in effort to maintain a manageable project scope, it has been decided to focus initial efforts on Consumer Packaged Goods (CPG).

## PROJECT PURPOSE AND DESCRIPTION

The Distribution Environment Data Collection project aims to enhance ISTA's value proposition by ensuring we continue to offer the industry's most current testing procedures. This data will be leveraged by packaging professionals to design optimized packaging solutions for both domestic and global distribution.

The ARVD has determined this to be a four (4) phase research program. The specific work sought for this RFP is directly related to Phase 1 below:

### Project Phases:

- 1. Documentation of the transport modes, storage, and handling methods involved in the distribution of CPGs, including "last segments", in predetermined regions around the world.**
2. Collect as much "sanitized" distribution damage information as companies are willing to share for the channels of distribution study in Phase 1 so that the Advocate Council and ISTA staff can determine a prioritization as to which regions/channels need an initial environmental data collection study, establishing exactly what needs to be measured and observed in each.
3. Undertake an initial transport environment data collection study to determine if any of the studied regions/channels vary enough from current test procedure performance levels to warrant a complete investigation.
4. A complete study of regions/channels identified in Phase 3 for the possible establishment of new or revised test profiles.

## SCOPE OF WORK SOUGHT IN THIS REQUEST FOR PROPOSAL

The work sought in this RFP is the creation of a technical report detailing the transport modes, storage and handling involved in the distribution of CPGs, including “last segments”, in predetermined regions around the world. The report shall take into account existing literature but will primarily focus on field observations. The final report will detail, with text descriptions, pictures and videos (where possible), all the variables found in the research.

It is expected that the provider will have representatives establish firsthand knowledge of the distribution of CPGs within a specific region. The final report will provide both written and visual documentation of the various modes of transport, handling, and storage methodologies employed for distributing CPGs within the pre-determined regions. This includes both pictures and videos (where possible).

The regions and countries to be studied follow and may be quoted in total if there are cost savings for doing all regions, Or as separate proposals for one or more specific regions of your choosing. Due to cost and time considerations, the Advocate Council may have to prioritize and explore regions individually:

- North America (USA, Canada and Mexico)
- South America (Brazil, Columbia, Argentina, Peru, Venezuela and Chile)
- Scandinavia (Denmark, Norway and Sweden)
- Western Europe (France, Germany, Italy, Spain, Turkey & UK)
- Eastern Europe (Poland, Romania)
- East Asia (China, Japan, South Korea)
- South Asia (includes India, Pakistan)
- South East Asia (Australia, Philippines, Singapore, Taiwan, Malaysia, Vietnam, Thailand)
- Middle East

These are the modes that are to be observed and documented, if they exist within each region:

- Rail
- Air
- Ocean
- Land
  - Full Truck
  - LTL
  - Parcel Delivery

These are the channel types (including reverse logistics) to be observed and documented, if they exist within each region:

- Manufacturer to Import DC
- Manufacturer to DC
- DC to Retail
- DC to Warehouse/Supplier to Retail
- E-commerce Retailer to Consumer
- E-commerce Manufacturer to Consumer

## **DELIVERABLES**

The Scope of Work states requirements for the project, including the services and the tangible work products to be delivered, and the tasks the Advocate Council has identified as necessary to meet those requirements. Proposals should be tailored specifically to the project at hand. The Advocate Council reserves the right, however, to modify specific requirements, based on changed circumstances, the proposal selection process, and contract negotiations with the Applicant(s) selected for negotiations, and to do so with or without issuing a revised RFP. The Applicant must provide in its proposal a detailed proposed scope of work showing how it will meet the RFP requirements.

The deliverables, at a minimum, need to include a technical report which documents the following:

- The types of transport vehicles/modes used to move CPGs within the region(s) of study. The report will include pictures, videos and text descriptions for each vehicle/mode type and should detail the range in size and type of transport found in each mode of transport. The report will also detail which forms of transport were used in the last segment of the supply chain, where it reaches the ultimate consumer of the packaged-product. The report should also include an estimate of the types of CPGs product moving in each mode of transport, with special emphasis on the last segment.
- The types of storage facilities used to store CPGs and the types of handling equipment utilized within the facilities in the region(s) of study. The report will detail the range of stacking heights for each facility type and include pictures, videos and text descriptions.
- The various types of handling CPGs encounter throughout the supply chain (point of manufacture and/or import to final consumer). The report will include pictures, videos and text descriptions of transfers during transport (by mode), receipt and shipping from warehouses and the last leg to final consumer for each mode of transport found within the region(s) of study.

## **MINIMUM QUALIFICATIONS FOR PRINCIPAL CONSULTANT/S**

Knowledge of supply chain components including transport systems, warehousing and handling systems is required. Past experience in transport distribution environment measurement or observational study of supply chains is preferred.

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**Please provide the following items as part of the proposal for consideration:**

## **FORM OF THE PROPOSAL**

Provide two copies (or one electronic version) of the proposal that must include the following sections:

### 1. Qualifications:

- A brief description of the proposing firm /research organization/ individual.
- A detailed description of the proposed individuals that would be assigned to this project, including role, title, experience, and education. If this varies for each geographical region please provide this information for each region quoted.
- Examples of similar research projects conducted in the past 5 years.
- At least three references, including the names of individual contacts and telephone numbers.
- Any other qualifications deemed necessary to complete the work if contracted by ISTA.

### 2. Fees:

Give a total cost estimate for time and materials within the scope and timeline you propose including payment terms and schedule. Progress payments can be considered provided the proposal identifies how project progress can be verified. (i.e. upon submission of completed literature search, initial draft, final report, etc.)

- The proposal must include the total cost to complete the tasks described in the project scope for each region you choose to be considered for on this project.
- Proposed agreements, including detailed fees and billing information and service level. List of charges that would be passed on to ISTA (e.g., travel, support staff, photocopies, etc.).
- Representative examples of consultant(s) and support staff that might be involved in specific activities. No more than five examples are requested; each example should include the name of the individual and a brief statement of their qualifications.
- List any other fees applicable to the work requested by ISTA, acknowledging they must be approved in advance.

### 3. Project Timeline:

A detailed timeline should accompany the project plan for each region under consideration.

### 4. Conflicts Analysis: (If necessary)

Assurance that the firm has conducted an initial conflicts analysis and has not uncovered any potential conflicts.

## **SUBMISSIONS**

All proposals must be received by 12-9-15.

Address proposals to:

A.J. Gruber  
ISTA  
1400 Abbot Road, Suite 160  
East Lansing, MI 48823

Or by email to [ajgruber@ista.org](mailto:ajgruber@ista.org)

Questions regarding this RFP or your proposal submission may be addressed to A.J. Gruber at the above email address, or telephone 517-333-3437 ext. 212.

## **SELECTION PROCESS**

The ISTA staff, its Technical Division Board and Representatives of the ARVD consortium will evaluate all proposals and may conduct telephone conferences to clarify information such as approach, timing and costs.

All proposals will be evaluated based on the following criteria:

- Overall proposal suitability: proposal must meet the purpose, scope and needs included herein and be presented in a clear and organized manner
- Experience: Potential contactors will be evaluated on their experience as it pertains to the scope of this project
- Previous work: Potential contractors will be evaluated on examples of their work pertaining to similar research projects as well as testimonials and references
- Value and cost: Potential contractors will be evaluated on the cost of their proposal based on the work to be performed in accordance with the scope of this project
- Technical expertise and experience
- The ability of the potential contractors to complete the project according to the proposed timeline

Once all proposals have been received and reviewed, the Advocate Council will complete the Phase Gate 2 review of the project evaluation form. This consists of the following topics:

- Aligns with at least one primary use of funds as outlined in Prospectus
- Value/potential impact/benefit to advocates
- Demands of performing project
- Costs and resources
- Project potential
- Risk

If at least one proposal passes Phase Gate 2 review, the project will move forward.

The Advocate Council and ISTA staff shall determine a prioritization as to which regions/channels are to be studied and establishes exactly what needs to be measured and observed in each based upon the costs associated with the quotes received.

Final selection of a project provider will be made by the voting members of the ARVD.

#### **RFP TIMELINE**

11/4/2015 - Release and distribution of RFP

11/18/2015 - Deadline for vendors to submit written questions and/or non-mandatory notice of intent

12/2/2015 - Questions with written answers provided to all interested vendors

12/9/2015 - Deadline for submitting proposals

12/16/2015 - Finalists notified

1/6/2016 - Finalist interviews

1/27/2016 - Vendor selected & signed