

ISTA Advocate Research & Value Delivery Program

	<h2>Request For Proposal</h2>		
DATE ISSUED March 21, 2017	REQUIRED SUBMITTAL DATE June 1, 2017	DOCUMENT NO. RFP - 0001	PAGE NO. 1 of 5
TITLE Eliminate Over-Packaging Phase 1: Ideation & Scoping			

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) seeks to develop and validate a new technique that quantifies how far beyond a chosen performance threshold a package is able to protect the product it contains.

PROJECT PURPOSE AND DESCRIPTION

The Eliminate Over-Packaging project seeks to develop and validate a new technique that quantifies how far beyond a chosen performance and confidence level a package is able to protect the product it contains. The established performance thresholds will correlate to the probability that the package or package system being evaluated will be damaged in its predicted supply chain. This will result in a package or package system's design that is appropriate for the level of risk willing to be assumed rather than a simple pass or fail result. The end result is packaging that can be optimized against different risk levels resulting in lower material cost and environmental footprint. Establishing a new technique also works to enhance ISTA's value proposition by ensuring we continue to offer the industry's most current testing practices and improve our member's speed to market.

Project Phases:

1. Ideation & Scoping

- a. Establish a baseline for work previously conducted around the scope of this project. The benchmarking work will include, but is not limited to, a literature review.
- b. Facilitate ideation with Subject Matter Experts (SMEs) from different backgrounds and professional disciplines to generate potential new techniques that would achieve the project's objective. These SME's must be approved and potentially supplemented by ISTA in advance of initiating this ideation session(s).
- c. Compile new ideas and existing methods into a prioritized list of processes or techniques that may achieve the project objective and have the greatest potential for implementation that meet the following criteria:
 - i. The process needs to be adaptable to all forms of packaged goods
 - ii. The process should allow the designer to choose a level of confidence (risk tolerance)
 - iii. The process should allow the designer to define and select inputs based on their supply chain hazards by mode, channel and region.

- iv. The process should be viewed as a precursor to the use of already established ISTA protocols which can be supplemented with the designers own data.
- d. Accompanying each prioritized method should be the following estimates:
 - i. Degree of difficulty (risk level)
 - ii. Time involved in experimental design research
 - iii. Cost to develop
 - iv. Potential qualified researchers
- 2. **Experimental Design:** Develop an Experimental Design for the proposed test method(s) established in phase one (1) of this project.
- 3. **Validation:** Validate the testing method(s) by conducting research and testing of the Experimental Design established in phase two (2) of this project.

SCOPE OF WORK SOUGHT IN THIS REQUEST FOR PROPOSAL

Compile new ideas and existing methods (**Identified above as Phase 1**) into a prioritized list of testing technique(s) that achieve the project objective and have the greatest potential for implementation. The list of proposed testing technique(s) must be substantial in nature enabling a subsequent request for proposal (RFP) to be sent out with the objective of developing an Experiment of Design based upon the prioritized idea(s). New ideas and existing methods will be identified through the following methods:

- 1. **Existing Methods:** Establish a baseline for work previously conducted around the scope of this project. The benchmarking work will include, but is not limited to, a literature review.
- 2. **New Ideas:** Facilitate ideation with Subject Matter Experts (SMEs) from different backgrounds and professional disciplines to identify potential new processes and validation techniques that would achieve the projects objective.

DELIVERABLES

- 1. Overview of the approach utilized to compile the list of testing processes or technique(s).
- 2. Detailed rationale for each process or technique including citing any reports, studies, or existing procedures that were utilized in the development of the proposed technique(s).
- 3. A list and qualifications of all SME's utilized as well as their professional disciplines utilized for any ideation along with a brief justification for each discipline selected.
- 4. Description of any proposed individuals beyond those utilized for SME ideation which would be assigned to this project, including role, title, experience, and education.
- 5. A list of all ideas considered even if they were subsequently disqualified by the group. For those considered as having merit, provide an adequate description in sufficient detail of the proposed process or technique to enable a subsequent request for proposal (RFP) to be generated should an experiment of design be sought to validate the purposed process or technique. This should include estimates of degree of difficulty (risk level), time involved in

experimental design research, the cost to explore and/or develop the concept as well as a list of potential qualified researchers.

6. A detailed report summarizing the findings for the benchmarking study, transcripts from the SME's ideation and a compiled list containing an in-depth explanation of mutually agreed upon top ideas by the SME's.

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.)

- a. The proposal must include the total cost to complete the tasks described in the project scope for Phase 1 of this project.
- b. 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.
- c. 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.

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 June 1, 2017.

Address proposals to:

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

Or by email to ajgruber@ista.org **and** dwight@consultschmidt.com

Questions regarding this RFP or your proposal submission may be addressed to Dwight Schmidt, ISTA Advocate Program Manager, at the above email address, or telephone 317-753-1437.

SELECTION PROCESS

The ISTA staff, its Technical Division Board and the Technical 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 a Phase Gate review of the project. 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 this Phase Gate 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 Advocate Council.

RFP TIMELINE

March 21, 2017 - Release and distribution of RFP

April 10, 2017 - Deadline for vendors to submit written questions and/or non-mandatory notice of intent

April 14, 2017 - Questions with written answers provided to all interested vendors

June 1, 2017 - Deadline for submitting proposals

June 15, 2017 - Finalists notified

June 15th week - Finalist interviews

July 5, 2017 - Vendor selected & signed