



# Request for Proposals (RFP): Packaging and Shipping: Division 6.2 Materials Training Provider

**RFP Post Date: July 6, 2020**

**Responses Due: August 6, 2020**

**Submissions due to Josh Rowland** ([josh.rowland@aphl.org](mailto:josh.rowland@aphl.org))

via: The Association of Public Health Laboratories, Inc.  
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## Summary

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The Association of Public Health Laboratories, Inc. (APHL or the Association), in collaboration with the Training and Workforce Development Branch, Division of Laboratory Services, Centers for Disease Control and Prevention, is seeking a Packaging and Shipping: Division 6.2 Materials (P&S) Training Provider (Provider). The Provider will develop and deliver training in accordance with Department of Transportation (DOT), International Air Transport Association (IATA) and United States Postal Service (USPS) regulations. The target audience for the training is public health and clinical laboratory professionals. All training offered will be coordinated by APHL for its members, public health laboratory partners and clinical laboratory stakeholders.

Through this Request for Proposals (RFP), APHL seeks to identify a company or individual who can fulfill requirements for in-person and/or distance based P&S training to satisfy certification requirement for:

- Category A Infectious Substances (UN2900 and UN2814)
- Category B Infectious Substances (UN3373)
- Exempt Human and Animal Substances
- Dry Ice (Class 9, UN1845)

## Background

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APHL is a non-profit organization that works to safeguard the public's health by strengthening public health laboratories (PHLs) in the United States and globally. APHL is organized under the laws of the United States of America's District of Columbia, with its headquarters office in Silver Spring, MD. The Association's members include state and local laboratories, state environmental and agricultural laboratories and other government laboratories that conduct testing of public health significance. APHL is recognized as tax exempt in the United States under Section 501(c)(3) of the U.S. Internal Revenue Code. Its work on behalf of public health labs spans more than 60 years.

In collaboration with its members, APHL advances laboratory systems and practices and promotes policies that support healthy communities globally. The Association serves as a liaison between the public health laboratories and federal and international agencies. It ensures that the network of public health laboratories has current and consistent scientific information in order to be ready for outbreaks and other public health emergencies.

The APHL Training and Workforce Development Program currently implements training and workforce development initiatives for public health and other laboratories in the United States. APHL supports this initiative through Cooperative Agreement Numbers NU60OE000104 and NU60OE000103 with CDC. Training and/or workforce development initiatives are solely the responsibility of the authors and do not necessarily represent the official views of the Centers for Disease Control and Prevention or the Department of Health and Human Services.

## Eligibility

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Interested parties must submit a proposal to APHL that provides all of the information specified in the Scope and Approach section below. In order to be considered for funding, an applicant must ensure APHL has received a complete proposal by no later than the Proposal Due Date specified in the Anticipated RFP Schedule section below. Applicants will find proposal submission information in the Response Submittal section below.

## RFP Schedule

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Applications are due to the individual(s) specified in the Final Response section of this **RFP by 5:00 pm Eastern Standard Time (EST) on August 6, 2020**. APHL anticipates the following schedule for the entire competitive bidding process:

July 6, 2020	APHL issues RFP
July 16, 2020	Letter of Intent due to APHL by 5:00 pm EST
July 23, 2020	Last day to submit questions (exceptions may be granted at APHL's sole discretion)
<b>August 6, 2020</b>	<b><i>Complete RFP responses due to APHL by 5:00 pm EST</i></b>
August 13, 2020	APHL completes the evaluation process and contacts winning/selected applicant
August 17, 2020	APHL publicly announces the names of the selected applicants on its procurement website, <a href="http://www.aphl.org/rfp">www.aphl.org/rfp</a>
August 24, 2020	Contract finalized
<b>September 1, 2020</b>	<b>Anticipated start date of the P&amp;S Provider work</b>

APHL will post any changes to the RFP schedule to the [APHL procurement website](#).

## Response Submittal

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### Confirmation of Intent to Respond

APHL requests that prospective applicants submit a brief email statement indicating intent to submit a proposal by **no later than 5:00 PM EST on July 16, 2020**. The letter of intent should be emailed to [josh.rowland@aphl.org](mailto:josh.rowland@aphl.org). **A letter of intent is required for consideration of application.** While the letter of intent is not binding and does not enter into the review of the RFP, the information contained in the letter of intent allows APHL's evaluation team to plan the contract development and review process.

Potential applicants must include the name of the organization or individual that will submit the proposal in their email.

## Final Response

APHL must receive a complete proposal by no later than **5:00 PM EST on August 6, 2020**. Applicants may send proposals by the following methods:

Via email to [josh.rowland@aphl.org](mailto:josh.rowland@aphl.org); or

Via certified, registered or express mail through the postal service or via trackable mail delivery services provided by DHL, FedEx, and UPS, addressed to:

**c/o Josh Rowland**  
The Association of Public Health Laboratories, Inc.  
8515 Georgia Avenue, Suite 700  
Silver Spring, MD 20910

APHL will send an email acknowledging the receipt of your application. If you do not receive an acknowledgement within 48 hours, please email the points of contact below to confirm receipt.

Regardless of the delivery method, APHL must receive all responses by 5:00 PM EST. It is the applicant's responsibility to ensure that the proposal is received at APHL by this deadline.

APHL may terminate or modify the RFP process at any time during the response period.

## Questions

Please direct all questions regarding this RFP or its application requirements via email to Josh Rowland at [josh.rowland@aphl.org](mailto:josh.rowland@aphl.org), with a copy to Catherine Johnson at [catherine.johnson@aphl.org](mailto:catherine.johnson@aphl.org).

A member of APHL's Training and Workforce Development (TWD) staff will respond directly to the questions on an individual basis as questions are received. While APHL will endeavour to answer questions within one business day of receipt, additional time may be needed depending on the issue raised.

*APHL should receive all questions by 5:00 pm EST on July 23, 2020.* APHL is unlikely to answer any question received after this deadline, but it will have discretion to do so if APHL's TWD staff reasonably feel that the question raises a substantial issue that could affect multiple applicants, and may be answered without impacting the application submission and review process. Should APHL opt to answer any late questions, APHL will post the question and answer to APHL's procurement website and will not respond directly to the sender.

## Project Term and Award

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The Packaging and Shipping: Division 6.2 Materials Training Provider will be awarded an initial contract from September 1, 2020 to June 30, 2021. APHL anticipates the potential for renewals for a period of up to four (4) additional years (with each additional funding year running from July 1 to June 30) for a total of five (5) years. Each potential annual renewal will depend on the funding received by APHL and by CDC programmatic needs in that funding year.

APHL anticipates distributing funds via the payment terms specified in the written contract between APHL and the selected organization or individual. The selected applicant will perform the duties described below in the Scope and Approach section and specified in the contract with APHL. APHL will award funding on a sliding scale based on the qualifications and years of experience possessed by an organization's staff or an individual applicant, with maximum potential compensation in the initial contract period of \$80,000. The organization or individual selected as the Packaging and Shipping: Division 6.2 Materials Training Provider will receive a notice of award from APHL.

APHL has responsibility for validating the accuracy and completeness of the content of the final products and all materials created.

## Scope and Approach

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The Training Provider will provide P&S training that will fulfill requirements for in-person and/or distance based P&S training to satisfy certification requirement for:

- Category A Infectious Substances (UN2900 and UN2814)
- Category B Infectious Substances (UN3373)
- Exempt Human and Animal Substances
- Dry Ice (Class 9, UN1845)

All training offered will be coordinated by APHL for its members, public health laboratory partners and clinical laboratory stakeholders.

The applicant has the opportunity to respond to any or all of these training delivery types:

- A. Instructor led in-person seminar, participants in one location: Packaging and Shipping: Division 6.2 Materials
- B. Instructor led virtual (live) seminar, participants in one location: Packaging and Shipping: Division 6.2 Materials
- C. Instructor led virtual seminar, participants in different locations: Packaging and Shipping: Division 6.2 Materials

The applicant will be expected to do the following:

1. Develop a strategy to deliver 30 P&S training events following current DOT and IATA regulations. The training should:
  - a. Provide awareness of DOT, IATA and USPS regulations
  - b. Provide function specific training needed to pack, label and document materials
  - c. Provide training that meets UN3373, UN2814, UN2900, UN1845 and exempt human and animal specimen regulations
  
2. Develop training that incorporate the following general layout.
  - a. Introduction
  - b. Pre-test (ungraded knowledge assessment) before learning activity
  - c. Main content, consisting of 2-5 units with ungraded knowledge checks
  - d. Post-test (graded knowledge assessment) after the learning activity
  - e. Evaluation
  - f. Post-training assessment issued 3-4 months after training to assess change in work practices
  
3. All materials must be developed with APHL branding (brands, colors and logos will be provided) and have funding statement listed.

#### **Proposed Description of Seminar:**

This intermediate-level, one-day seminar provides a comprehensive overview of regulations applicable to packaging and shipping laboratory specimens. Lectures, demonstrations and group exercises will be used to provide instruction on complying with international, federal and local transportation regulations. Participants will be tested on their knowledge of the regulations and receive documentation of attendance and testing. Participants must meet DOT training requirements upon satisfactory course completion and documentation of OSHA blood borne pathogen or other safety training and security training.

#### **Learning Objectives**

- Classify, mark, label, and document Division 6.2 hazardous materials (UN3373, UN2814, UN2900 and UN1845) and exempt human and animal specimens properly for transport by land, air and United States Postal Service.
- Outline DOT training requirements, including the responsibilities mandated for testing and documentation.
- Choose the most appropriate DOT exception to use when transporting Division 6.2 materials by motor vehicle.

#### **Competencies Achieved**

- Training will meet competencies described in the [Competency Guidelines for Public Health Laboratory Professionals](#) document:

- Successful completion of the training will result in learning gained by the participant in the Microbiology domain, Packaging and shipping competencies, Beginner level:
  - MCB 3.02: Packaging and Shipping: Describes routine sample collection, labeling, and handling policies, processes, and procedures for microbiological examination
  - MCB 3.03: Material transport: Describes the importance of adhering to established policies, processes, and procedures regarding microbiological material transport

## Proposal Submission

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### Guidelines and Required Information

The applicant must ensure that APHL receives its letter of intent and its complete response by the due dates set out in the Anticipated RFP Schedule above. *APHL's evaluation team will not review incomplete applications.*

There is no designated response format or outline for responding to this RFP. However, regardless of the chosen format, an applicant's proposal must be limited to 15 pages of narrative and visuals. If an application exceeds this 15 page limit, only the first 15 pages will be sent to the evaluation team and scoring will be based solely on the portion of the proposal submitted for review. An application should have a font size of 11 points or larger and page margins of at least 0.5 inches. *Note:* Neither the Cost Proposal described below nor anything included as an appendix will count as part of the 15-page count (material included as an appendix will only be used as reference material and will not be reviewed as part of the evaluation process).

The applicant must include the following in their 15 page response:

1. A company profile;
2. A description of two (2) past learning/development activities that best reflect the applicant's work and relevancy to this project. Examples of course materials, including links to active courses, may be included as an appendix. Activities should be linked to prior work experience rather than part of an educational requirement for a degree/education;
3. Reference information from two (2) former or current clients. Include company name; contact person's name; contact person's phone number and/or email address; and description of product delivered;
4. A description of what type of team will be assigned to this project, including a description of each person's role (resumes or CVs should be provided as an appendix); and
5. A brief description of the applicant firm's project management and instructional development processes.



## Cost Proposal

The applicant should provide a detailed cost estimate and explanation/justification of costs. The cost proposal must be a maximum of three (3) pages. There is no required format and the cost proposal should be submitted in the format of the applicant's choice.

The cost estimate should include the number of contract hours estimated to complete the development of the training and materials or supplies needed. Cost estimates should also include travel estimates.

## Evaluation

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### Initial Review

APHL staff members will conduct an initial review of all proposals for completeness. APHL will not consider any applications incomplete by the proposal due date specified in the Anticipated RFP Schedule section above. Incomplete proposals will not receive a formal evaluation.

### Evaluation Process

APHL will conduct reviews via a combination of teleconference and email communications between the evaluation team described below. APHL's TWD Manager, Training will coordinate the review process and the evaluation sessions.

The reviewers may request follow-up interviews with all or some of the applicants and, following these interviews, may request supplemental information on an applicant's proposal. These interviews and any supplemental information will clarify an applicant's capacity or experience in one or more of the evaluation criteria, or will help to explain other information contained in an applicant's proposal.

### Evaluation Team

An evaluation team will be assembled to evaluate competitive proposals and then assess their relative qualities based on the Evaluation Criteria outlined below. This evaluation team will consist of five APHL staff.

### Conflicts of Interest

APHL will ask potential reviewers to complete and sign APHL's **Conflict of Interest Disclosure Statement** in order to disclose any real or perceived conflict of interest prior to the start of the evaluation process and to affirm that they have no conflict of interest that would preclude an unbiased and objective review of the proposals received. APHL will not select reviewers with a perceived or potential conflict of interest. Once potential reviewers have been identified, APHL's TWD Director will have final approval over the review team's composition.

## Evaluation Criteria

The evaluation team will use the following criteria as a general overall framework in which to evaluate proposals:

- *Suitability of the Proposal* – The proposed solution meets the needs and criteria set forth in the RFP.
- *Training Provider Expertise* – The applicant shows knowledge of the subject by recommending and communicating appropriate P&S instruction technical solutions as evidenced by the proposal and references.
- *Training Provider Organizational Capacity* – Applicant has successfully completed similar P&S instruction projects and has the qualifications necessary to undertake this project. The applicant firm has appropriate staff to devote to the project within the timeframe needed.
- *Project Management*- The applicant shows experience and resources related to successful completion of a similar P&S instruction projects.
- *Value/Pricing Structure and Price Levels* – The price is commensurate with the value offered by the applicant.

Each member of the evaluation team will evaluate proposals against the 13 questions or criteria found in Appendix A: Packaging and Shipping: Division 6.2 Materials Training Provider RFP Scorecard and will assign a numeric score from zero (0) (indicating a ‘poor’ response) to four (4) (indicating an ‘outstanding’ response) to reflect that reviewer’s assessment of the responsiveness of a proposal to each question or criterion. The evaluators will assign scores using the following categorizations:

- *Poor* (0 points) – The respondent’s proposed approach neither meets the baseline requirements set out in this RFP nor demonstrates more than a minimal understanding of the subject matter.
- *Fair* (1 point) – The respondent’s proposed approach does not meet the baseline requirements set out in this RFP but does demonstrate a baseline understanding of the subject matter.
- *Good* (2 points) – The respondent’s proposed approach meets the baseline requirements set out in this RFP and demonstrates the necessary understanding of the subject matter.
- *Excellent* (3 points) - The respondent’s proposed approach exceeds the baseline requirements set out in this RFP and demonstrates a deep understanding of the subject matter.
- *Outstanding* (4 points) - The respondent’s proposed approach greatly exceeds the baseline requirements set out in this RFP and demonstrates a thorough and comprehensive understanding of, or an expertise in the subject matter.

The raw scores will be weighted in such a manner so that the 52 maximum possible raw score points will be converted into a maximum possible weighted score of 100 points.

## Post Evaluation Procedures

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APHL staff will notify the selected Provider within ten (10) business days of completion of the evaluation. Unsuccessful applicants will receive notification of these results by e-mail or by U.S. mail

within 30 days of the date that the winning/successful vendor is selected. Note: Once selected, the applicant must be approved by the federal funding agency.

All applicants will be entitled to utilize APHL's Appeals Process to formulate a protest regarding alleged irregularities or improprieties during the procurement process. Specific details of the policy are listed on the procurement website.

## Conditions of Award Acceptance

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The eligible applicants must be able to contract directly with APHL or have an existing relationship with a third party organization that can contract directly with APHL on behalf of the applicant. Applicants must agree to comply with expectations outlined in the appendices.

## General Considerations

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This RFP is neither an agreement nor an offer to enter into an agreement with any respondent. Once application evaluation is complete, APHL may choose to enter into a definitive contract with the selected applicant or it may decline to do so.

APHL must ensure that the selected respondent is neither suspended nor debarred from receiving federal funds and that the respondent meets any other funding eligibility requirement imposed by the Cooperative Agreement. APHL's determination of whether the respondent is eligible to receive Cooperative Agreement funding will be definitive and may not be appealed. In the event that APHL determines that the selected respondent is ineligible to receive Cooperative Agreement funding, APHL will nullify the contract or will cease negotiation of contract terms.

Each respondent will bear its own costs associated with or relating to the preparation and submission of its application. These costs and expenses will remain with the respondent, and APHL will not be liable for these or for any other costs or other expenses incurred by a respondent in preparation or submission of its application, regardless of the conduct or outcome of the response period or the selection process.

## Appendix A– Packaging and Shipping: Division 6.2 Materials Training Provider RFP Scorecard

The following table is a copy of the scorecard that will be used to evaluate RFP responses.

Scoring:	Poor: 0	Fair: 1	Good: 2	Excellent: 3	Outstanding: 4
Category	Criteria	Score	Comments		
<b>Suitability of the Proposal:</b> Does the applicant's proposal demonstrate an understanding of the operational need of the project and follow application instructions?	To what degree did the proposal meet the overall objectives of the project?				
	Did the applicant follow instructions - i.e., stay in page count, include required information?				
	Is the information presented in a clear, logical manner and is well organized?				
	Did the applicant provide references for two former or current clients?				
	<b>Section Total</b>				
<b>Packaging and Shipping: Division 6.2 Materials Training Provider Expertise:</b> The applicant shows knowledge of the subject by recommending and communicating appropriate P&S instruction technical solutions as evidenced by the proposal and references.	Did the applicant list and articulate two past learning and development activities they produced that best reflect their work and relevancy to this project? Are the activities articulated at a quality level that APHL seeks?				
	Did the applicant thoroughly explain and have experience in developing P&S courses?				
	Is the applicant's existing knowledge and experience in this field as described in the proposal relevant to the project? (provided company profile, length of time in business and experience) designing and developing competency-based training)				
	<b>Section Total</b>				
<b>Packaging and Shipping: Division 6.2 Materials (P&amp;S) Training Provider Organizational Capacity:</b> Applicant has successfully completed similar P&S instruction projects and has the qualifications necessary to undertake this project. The applicant firm has appropriate staff to devote to the project within the timeframe needed.	Does the applicant have organizational capacity to produce the P&S courses?				
	Did the applicant outline an appropriate team to work on this project?				
	<b>Section Total</b>				

<b>Project Management:</b> The applicant shows experience and resources related to successful completion of a similar P&S instruction projects.	Does the applicant demonstrate project management experience relevant to offering the P&S courses?		
	Does the applicant have instructional development processes in place to achieve program goals according to a set schedule?		
	<b>Section Total</b>		
<b>Value/Pricing Structure and Price Levels:</b> Is the price commensurate with the value offered by the applicant?	Did the applicant hold some level of reasonable accuracy for time and cost based on the provided course design document and course layout?		
	<b>Section Total</b>		
	<b>Total Score</b>		