Request For Proposal

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TITLE

Distribution Environment Data Collection Project: Latin America (Brazil and Mexico)

OVERALL PROJECT BACKGROUND

The International Safe Transit Association (ISTA) will conduct data collection on a variety of distribution scenarios in order to validate its existing data and add additional transport distribution environment data from other regions to its Data Depot. In an effort to maintain a manageable project scope, it has been decided to focus this project on the various channels of Consumer Packaged Goods (CPG) distribution.

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 purpose of this broader project is to undertake a transport environment data collection study, obtaining atmospheric, vibration, storage and handling data that meets established ISTA data collection standard for five prioritized global distribution routes.

This broader project has been structured in phases, with this project phase being focused on data collection of representative land routes in Brazil and Mexico. We recognize that the actual route selection will greatly depend on the CPG partners involved in the study. Therefore, this RFP provides guidance but is not prescriptive on the actual routes chosen. We encourage you to offer recommendations for representative routes that will capture the hazard variations within Brazil and Mexico routes. Please provide a justification and rationale as to why these routes are considered representative from your perspective. The final routes will be subject to ISTA's approval. We encourage bidders to contact ISTA with questions.

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 the representative land routes in Brazil and Mexico. The report shall take into account existing literature but will primarily focus on field measurements collected in compliance with the ISTA Data Collection Standards for shock, vibration and atmospheric conditions, which are available upon request.

It is expected that the provider will have representatives follow the distribution systems of at least three major CPG companies (approved by ISTA), that operate in Brazil and/or Mexico, individually, and are shipping products representative of CPGs moving within those respective countries that are utilizing the modes and channels noted below within the routes of interest. The data collection will include five (5) replicate trips per route in an attempt to assure a cost-effective, statistically valid data sample, along with capturing the location tagging along the routes. Note that the provider will be responsible for identifying and arranging access to the CPG distribution facilities and routes. SC Johnson has agreed to participate in this project as a commercial partner and will provide access to their distribution networks in Brazil and Mexico. As previously noted, the routes will be subject to ISTA's approval.

A final report will be provided to ISTA detailing all the locations, routes, modes and channels surveyed. It will also present text descriptions, pictures and videos (where possible), of the distribution systems, package/product type and CPG producers studied along with recorded data measurements documenting the hazards incurred in the various modes of transport, handling, and storage methodologies employed for distributing CPGs within the targeted land routes in Brazil and Mexico, respectfully.

These are the modes to be observed, measured and documented, <u>if they exist</u> within the targeted land routes within Brazil and Mexico, respectively:

1. Rail
2. Road
    a. Full Truck - unitized and/or floor loaded
    b. Less-Than-Truckload (LTL) – unitized and/or floor loaded
    c. Parcel Delivery
    d. Other vehicles which represent a predominant means of moving packaged products. This could vary depending on the region of study.

These are the channel types to be observed, measured and documented, if they exist within the targeted land routes in Brazil and Mexico, respectively:

1. Port to Import DC
2. Manufacturer to DC
3. DC to Retailer
4. DC to Warehouse/Supplier to Retailer
5. DC to Cross Dock to Warehouse/Supplier to Retailer
6. DC to Distributor Warehouse to Retailer
7. Last-segment delivery

DELIVERABLES

The Scope of Work states requirements for the project, including the services and the tangible work products to be delivered, and the tasks ISTA has identified as necessary to meet those requirements. Proposals should be tailored specifically to the project at hand. ISTA 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. In all cases the final contract will be the governing document of the project. 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, are:

Final Report

- A final report detailing all the locations, routes, modes and channels surveyed. The final report should also present text descriptions, pictures and videos (where possible), of the supply chains, package/product type and CPG producers studied along with recorded data measurements documenting the hazards incurred in the various modes of transport, handling, and storage methodologies employed for distributing CPGs within and between the land routes of study in China.

- The report should identify the companies, products and locations of observations and measurements to assure they are representative of the CPGs being shipped in the respective countries. The format of the report and the method of data delivery must be approved in advance by ISTA.

- The report will also include the field data measurements, field data observations, data analysis, comparison to ISTA test procedures, and recommended draft transport and handling test sequences, as detailed below.

- The report will include a literature survey to document the currently available research relevant to the project scope. This information may be used as a comparison of the analyzed data, if appropriate.

- The selected research partner will present their findings at the annual ISTA Forum or other suitable ISTA event.

- Create and maintain a project in our online digital platform (ISTA Digital) to have a centralized location for the work, including updates, distribution maps and critical project documentation. ISTA will provide instructions on how to do this as part of the contract award.

Field Data Measurements

- Field data characterizing the types of transport vehicles/modes used to move CPGs within the land routes within and between the land routes of study in Brazil and Mexico, respectively. This information should be detailed in the final report through vibration data measurements,

location tagging, destination(s) tagging, pictures, videos and text descriptions. Please collect Multiple Degree of Freedom data as part of the data collection effort, but analysis of this data is desired but not required.

- Field data characterizing the types of storage facilities used to store CPGs and the types of handling equipment utilized within the facilities. The report will detail the range of stacking heights for each facility type, stacking patterns, duration of storage and storage methods (i.e. racking, floor stacked, etc.). This information should be detailed in the final report through atmospheric data measurements, shock data measurements, location tagging, pictures, videos and text descriptions.

  Please collect and analyze long-duration horizontal acceleration data (i.e. acceleration, braking, turning and roundabouts).

- All atmospheric, shock/drop, and vibration field data measurements should be collected in accordance with the ISTA Data Collection Standards.

Field Data Observations

- Field observational data characterizing the various types of handling CPGs encounter throughout the distribution system.
  - Observations of potential hazards or chronic problem areas such as conveyor jams, manual handling where drops or tossing packages occur, unusually long or steep transfer chutes, bridged impacts for elongated packages, center or concentrated impacts for flat packages, etc. should be documented.
  - Any distinct handling practices based upon unique package or product criteria such as fragile products, high value items, big/bulky items, non-corrugated packaging (padded mailers), etc. should be noted.
  - Inbound, outbound and cross-docking processes, if and where applicable, including the pack out of CPGs, loading of trailers, staging (pre & post pack out), packaging materials, etc. should be documented through pictures, videos and text descriptions.
  - All handling types, storage conditions, hazards, etc. identified should have an accompanying distribution hazard category (shock, vibration, compression, environmental) assigned to it.

  This information should be detailed in the final report through shock data measurements, pictures, videos and text descriptions of transfers during transport (by mode), receipt and shipping from facilities. Distribution mapping will also be reflected in ISTA Digital as part of the project.

- Deviations in documented “standard” processes due to factors such as time of year (i.e. peak season, etc.) or geographic location (i.e. outside processing/storage in warmer climates, etc.) should be identified.

Data Analysis and Comparison to ISTA Test Procedures

- Summarized analysis of the collected data and comparison of the summarized data against the applicable current ISTA 3-Series or 6-Series procedures and any other relevant research identified in the literature survey, if appropriate.
- Please report vibration as average, 99th and 95th percentile spectrum, as well as kurtosis values across the frequency spectrum.
- Recommended draft transport and handling test sequences, including the vibration test profile(s) and drop sequence(s), based on the collected and analyzed data. This includes an explanation of how the recommended test sequences were developed from the collected field data.

MINIMUM QUALIFICATIONS FOR PRINCIPAL RESEARCHER/S

Knowledge of supply chain components including transport systems, warehousing and handling systems is required. Knowledge of, and experience with transport distribution environment data collection within Brazil and Mexico, respectively, is required. The Research Partner(s) must have commercial and professional relationships with the CPG firms identified in the proposal that will allow the researcher(s) access to their distribution systems.

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. Scope of Work:
   a. A brief description of the scope of work.
   b. A description of the recommended routes.
   c. Identification of possible CPG (commercial) partners.
   d. Confirmation of deliverables.

2. Qualifications:
   a. A brief description of the proposing firm /research organization/ individual.
   b. A description of who will manage the project, who will collect the field data and who will analyze the data and generate the report. This section will include a detailed description of the proposed individuals that would be assigned to this project, including role, title, experience, and education.
   c. Examples of similar research projects conducted in the past 5 years, with ideally at least one example of data collection in Latin America.
   d. Confirmation of prior business relationship with proposed commercial partners, along with

their tentative agreement to participate in the study.

e. At least three references, including the names of individual contacts and telephone numbers.

f. Any other qualifications deemed necessary to complete the work if contracted by ISTA.

3. 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, submission of final templates, etc.)

a. The proposal must include the total cost to complete the tasks described in the project scope.

b. The total cost must be broken into the following categories:

- Data Collection
- Data Analysis
- Reporting
- Overhead – limited to no more than 25%.

c. Include any proposed agreements, including detailed fees and billing information, and service level for this project. Include a list of charges that would be passed on to ISTA (e.g., travel, support staff, photocopies, etc.).

d. Include 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.

e. List any other fees applicable to the work requested by ISTA, acknowledging they must be approved in advance.

4. Project Timeline:

A detailed timeline should accompany the project plan.

5. Conflict 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 **September 12, 2025.**

Address proposals to:

Brian O'Banion
ISTA
1400 Abbot Road, Suite 380
East Lansing, MI 48823

Or by email to bobanion@ista.org

Questions regarding this RFP, your proposal submission or the submission deadline may be addressed to Brian O'Banion at the above email address.

SELECTION PROCESS

ISTA 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:

a. Overall proposal suitability: proposal must meet the purpose, scope and needs included herein and be presented in a clear and organized manner.

b. Experience: Potential contactors will be evaluated on their experience as it pertains to the scope of this project.

c. Previous work: Potential contractors will be evaluated on examples of their work pertaining to similar research projects as well as testimonials and references.

d. 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.

e. Technical expertise and experience.

f. The ability of the potential contractors to complete the project according to the proposed timeline.

g. The willingness of the contractor to execute a services contract and non-disclosure agreement with ISTA, drafts of which are available from ISTA.

RFP TIMELINE

August 1, 2025– Release and distribution of RFP
August 1 – September 10, 2025– Questions and answers exchanged
September 12, 2025 – Deadline for submitting proposals
October 3, 2025 – Selected researcher notified
October 24, 2025 – Contract signed