Request for Proposal

To provide proficiency testing samples

to meet the requirements
of AIHA Proficiency Analytical Testing (PAT) Programs’

Industrial Hygiene

Proficiency Analytical Testing

Program (IHPAT)
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1 INTRODUCTION AND GENERAL INSTRUCTIONS

Proposals are solicited in accordance with requirements of the attached Request for Proposal (RFP) for the AIHA Proficiency Analytical Testing Programs, LLC (AIHA PAT Programs).

Proposals due 5 p.m., Eastern, Monday, July 31, 2017.

Submit proposals electronically via email to:

Angela Oler
Director of Operations
aoler@aiha.org

Requests for any additional information concerning this RFP and all technical questions regarding this solicitation must be submitted electronically via email to Angela Oler, Director of Operations at aoler@aiha.org and must be received no later than 5 p.m., Eastern, Monday, July 17, 2017.

This RFP does not commit AIHA PAT Programs to pay any costs for the preparation and submission of a proposal. In addition, AIHA PAT Programs is not bound to accept any proposal, which is submitted to it for this program.

Any resulting interpretation or clarification will be made in writing to all firms/organizations expressing intent to submit a proposal. Any additions, deletions, or changes to the RFP will be made by an amendment to the RFP.

2 TERMS AND DEFINITIONS

AIHA PAT Board....... AIHA Proficiency Analytical Testing Board
Analyte Class..........Major testing group [e.g., Metals (IHPAT), Bacteria (EMPAT)]
BAPAT................... Bulk Asbestos Proficiency Analytical Testing
BePAT ................... Beryllium Proficiency Analytical Testing
ELPAT .................. Environmental Lead Proficiency Analytical Testing
EMPAT.................... Environmental Microbiology Proficiency Analytical Testing
IHPAT.................... Industrial Hygiene Proficiency Analytical Testing
PAT....................... Proficiency Analytical Testing
PT.......................... Proficiency Testing
QA .......................... Quality Assurance
QC .......................... Quality Control
RFP ........................ Request for Proposal
Round ...................... A set of samples to be analyzed during the testing period.
RSD ........................ Relative Standard Deviation

3 BACKGROUND AND PURPOSE

3.1 IHPAT Background Information

The Industrial Hygiene Proficiency Analytical Testing (IHPAT) Program is designed to test the analytical competence of participating laboratories and to assist a laboratory improve its analytical performance by providing proficiency testing samples on a regularly scheduled basis, evaluating the results, and providing a report on how well the laboratory performed. The
program currently provides metals, asbestos, silica, organic solvents and diffusive samples to participating laboratories worldwide.

Proposals are expected to define the manner in which variable quantities of IHPAT reference samples will be prepared according to AIHA PAT Programs specifications, verified, packaged, and shipped to participating laboratories.

The contents of each analyte sample set (metals, asbestos, silica, organic solvents and diffusive sampler) and the quantities of sample kits to be delivered to participants are variable. The number of program participants changes each round and the number of sample sets delivered must meet these changing requirements.

AIHA PAT Programs provides participant access to the PT rounds, data evaluation, and computer support for the IHPAT program.

AIHA PAT Programs will provide the selected Contractor with contact information for participants in the program prior to each round of proficiency testing.

The expected period of the contract is January 1, 2018 to December 31, 2019, with contract extension possible through December 31, 2022.

4 SCOPE OF WORK

All bidders shall demonstrate their ability to generate, package, and distribute traceable (as appropriate) proficiency test samples; test random samples for identification verification, provide record keeping and quality control, in accordance with the appropriate sections of the most current version of ISO/IEC 17043.

4.1 Sample Generation

4.1.1 IHPAT Samples

Prepare and verify a specified number of proficiency samples for each analyte, at a frequency defined below, for metals, silica, asbestos, organic solvents, and diffusive sampler badges.

Each sample set is to include five metals filters, five silica filters, five asbestos filters, ten charcoal tubes, and two diffusive sampler badges as noted below:

- Metals rounds are to contain four 0.8µm 37mm mixed cellulose ester (MCE) filters spiked with lead and two other metals -- cadmium, zinc, nickel, manganese or chromium -- which are rotated on the four (4) spiked filters that are distributed each round; the fifth filter is a blank. Lead-in-Air samples are the same metals samples analyzed in the IHPAT Program. Although there are two other metals on the filters, only lead is to be reported for the ELPAT Lead-in-Air Program. Lead-in-Air sample sets include four samples on 0.8µm 37mm MCE filters at differing concentrations and a blank filter.
- Silica rounds are to contain four (4) filters spiked with free silica (quartz) and one (1) blank.
- Asbestos rounds are to contain four filters spiked with fibers. Three (3) filters with a single type of asbestos fiber -- chrysotile, amosite, crocidolite, tremolite, anthophyllite, or actinolite -- and one (1) man-made fiber filter. The round may contain more than one type of asbestos, but the asbestos types shall not be mixed on a single sample (e.g. Sample 1 – amosite; Sample 2 – chrysotile; Sample 3 – tremolite). One (1) blank filter
shall also be included in each round. If asbestos types other than amosite and chrysotile are proposed, demonstrated homogeneity will be required prior to the initial round of use.

- Organic solvent rounds are to contain ten (10) sample tubes -- four (4) samples, one (1) sample blank, and five (5) additional blank tubes. The additional blank tubes are provided for determination of desorption efficiency of the media for the selected analytes. Each round shall contain one of the following: benzene, 1-bromopropane, ethyl acetate, or methanol, and, at most, two (2) other compatible analytes: benzene, ethyl acetate, n-butyl acetate, 2-propanol, chloroform, 1,2-dichloroethane, 1-bromopropane, o-xylene, toluene, trichloroethylene, or tetrachloroethylene. Methanol rounds may contain the single contaminant at four concentration levels and, regardless of analyte(s), shall be generated using carbon molecular sieve as the matrix. (Note: the organic solvents must be combined in a specific fashion for compatibility purposes, desorption purposes and tube type.)

- Diffusive sampler rounds are to contain three analytes -- benzene, toluene and o-xylene -- on two badges. Participants are allowed to choose their participation from three badge types (3M, SKC and Assay Technology).

- For any analyte class, when a new bulk material/contaminant is being considered, AIHA PAT Programs may require a round robin or pilot study occur to qualify the new material/contaminant. Any additional costs associated with a pilot will be discussed and agreed upon before the pilot study takes place.

**Frequency**

The number of sample sets may vary from round to round, depending on the number of participants. For purposes of pricing, minimum sample sets per round may be assumed as follows:

<table>
<thead>
<tr>
<th>Analyte Class</th>
<th>Frequency of Rounds</th>
<th>Average Expected Quantity for Each Round</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Current</td>
<td>Alternative</td>
</tr>
<tr>
<td>Metals</td>
<td>4x/year</td>
<td>3x/year</td>
</tr>
<tr>
<td>Asbestos</td>
<td>4x/year</td>
<td>3x/year</td>
</tr>
<tr>
<td>Organic Solvents</td>
<td>4x/year</td>
<td>3x/year</td>
</tr>
<tr>
<td>Silica</td>
<td>4x/year</td>
<td>3x/year</td>
</tr>
<tr>
<td>Diffusive Sampler</td>
<td>2x/year</td>
<td>3x/year</td>
</tr>
</tbody>
</table>

*AIHA PAT Programs is evaluating the frequency of rounds in the IHPAT Program, normalizing on 3 rounds per year for each analyte class. Proposals are to provide costs both for the current round frequency and alternative (3x/year) round frequency.

Pricing for each analyte is to be provided. It is anticipated that for each round there will be approximately 1000 kits total. All kit processing and shipment fees are to be identified in the proposal as a separate line item. International shipments will be sent by AIHA PAT Programs’ courier service. The cost of sending all international kits to the courier will be borne by the subcontractor as a one-off shipment per round. The shipment shall arrive to AIHA PAT Programs’ courier service at least 2 business-days prior to the shipment of domestic samples.

The exact number of samples to be prepared and verified for each round will be specified by
AIHA PAT Programs prior to the delivery date of the round. An excess number of sample sets will be specified by AIHA PAT Programs and are intended to be used as replacements, retest samples, or stock samples.

Retest rounds take place on a set schedule, with the same frequency (if participants are enrolled). All costs associated with storage, packaging, shipment, etc., shall be listed as a single line item as cost per retest kit.

4.2 Preparation Procedures

AIHA PAT Programs specifies program concentration ranges for each contaminant in a PAT Program Scheme on the AIHA PAT Programs’ website. The subcontractor may propose target concentration levels for each contaminant prior to each round’s sample generation. Proposed concentrations shall be reviewed and approved by AIHA PAT Programs. Target concentrations/challenges shall be varied each round.

4.2.1 IHPAT Samples

Prepared samples must fall within ±10% of the specified target concentration (in the square transformed state for Asbestos). In consideration of specific issues with respect to the analyte class, the subcontractor shall request AIHA PAT Programs review, and approve for use, a batch of samples which fall outside this specified range. Such review and approval is at the discretion of AIHA PAT Programs.

- Four concentration levels shall be prepared of each metal for each metals round.
- Four concentration levels shall be prepared for each silica and asbestos round.
- Four concentration levels containing up to three organic solvents shall be prepared each round for the organic solvents.
- Two concentrations of the three contaminants for each badge type shall be prepared for the diffusive sampler rounds.
- All sample sets will include at least one blank for each analyte class.

Metals: Generate filters of known amounts of metals using standard reference materials or other well characterized materials, as appropriate. The filters are to be 37 mm, 0.8 μm pore size mixed cellulose esters (MCE) membrane filters. The target concentration range for manganese, lead, nickel and chromium is 0.02 mg – 0.2 mg; cadmium target concentration range is 0.002 mg – 0.04 mg. The lead-in air target concentration range is 0.015 mg/m³ to 0.500 mg/m³.

Silica: Generate filters of target concentrations of free silica using standard certified quartz reference materials and include a background matrix, such as coal mine dust, talc, calcite or a combination of talc and coal mine dust. The filters are to be polyvinyl chloride (PVC), 37 mm, 5 μm pore size filters that are capable of providing interference-free silica determinations. The free silica (quartz) sample target concentration range is 0.05 mg – 0.225 mg. Lower spike levels may be requested if adequate recoveries are achieved (down to 0.025 mg).

Asbestos: Generate three filters of target concentrations of asbestos and one filter of a target concentration of man-made fibers (i.e. glass fiber) using standard reference materials or other well characterized materials, as appropriate and include a background matrix (i.e., alumina, as per the IHPAT Scheme). The filters are to be mixed cellulose esters (MCE) membrane filters, 25 mm diameter, 0.8 μm pore size. The target asbestos concentration range for samples is 100-800 fibers/mm² of filter surface. The target man-made fibers target
concentration range is 60-125 fibers/mm² of filter surface.

**Organic Solvent Samples:** The sorbent tube media must be appropriate for the analysis of the contaminant(s) used in the round. Generate four samples of target concentrations of up to three of the organic solvent contaminants. Six additional tubes for each analyte must be provided for the determination of desorption efficiency - (5) and sample blank (1). The target concentration range for the organic solvents is 0.03 mg – 2 mg; the target concentration range for chloroform is 0.125 mg – 2 mg.

**Diffusive Samples:** Prepare two concentrations of organic solvents onto each of the three diffusive sampler badge types -- 3M, AT, and SKC. AIHA PAT Programs will provide the quantity of each badge type needed prior to the round. The target concentration range for organic solvents on diffusive sampler badges is 8 ppm – 32 ppm for benzene and o-xylene and 8 ppm – 37 ppm for toluene.

### 4.3 Additional Requirements

#### 4.3.1 Quality Assurance

The subcontractor shall maintain a quality assurance system which ensures a high-quality product and strictly adheres to the applicable requirements of the current version of ISO/IEC 17043, *Conformity Assessment – General Requirements for Proficiency Testing*. Should an audit reveal nonconformities or concerns, the cost of correcting the findings shall be borne by the subcontractor.

The subcontractor shall perform an annual internal audit that reviews the applicable requirements of ISO/IEC 17043 standard. If the subcontractor is an ISO/IEC 17043 accredited proficiency testing provider for the area(s) of service provided to AIHA PAT Programs, evidence of such accreditation shall be provided to AIHA PAT Programs, along with a copy of the most recent audit report and responses, in lieu of a separate annual internal audit.

Should AIHA PAT Programs determine a need to perform an onsite audit to evaluate compliance with the current version of ISO/IEC 17043 standard, the cost of such an audit will be borne by the subcontractor.

#### 4.3.2 Acceptable Background Levels

The subcontractor is responsible for assuring that each lot of standards, sampling media, and sample analytes/sample challenges used is suitable for its intended purpose and complies with ISO/IEC 17043 and AIHA PAT Programs’ requirements with respect to homogeneity. Performance characteristics of laboratory methods and equipment used to confirm the content, homogeneity and stability of proficiency testing samples must be appropriately validated and maintained and records must be provided to AIHA PAT Programs.

#### 4.3.3 In-Process Quality Control

As a minimum, the subcontractor shall perform the following Quality Assurance (QA) functions:

- Determine the calculated concentration of the contaminant/analyte/matrix in each of the test sample materials.
- Control contamination of the various equipment and supplies used in the sample production and packaging processes and document verification of contaminant control.
- Analyze at least ten (10) randomly selected samples per level and provide statistical data to characterize the quality of the samples.
- Conduct and document QC confirmation of test materials to ensure homogeneity of test sample materials.
- Conduct and document periodic stability testing of test sample materials.
- Verify the test sample material using an array of techniques.
- Verify competent external reference analyses are performed to confirm subcontractor results, when needed or requested by AIHA PAT Programs.

### 4.3.4 Concentration Verification
The subcontractor shall verify the homogeneity of the test materials. A minimum of ten randomly selected samples will be analyzed from each sample concentration level. If more than one preparation batch is required, a minimum of ten samples must be analyzed from each batch verify concentration. The subcontractor may utilize the same samples and analyses conducted to satisfy the in-process quality control requirements. The subcontractor may propose additional testing for concentration verification. The maximum acceptable relative standard deviation (RSD) for any individual concentration level for each analyte/contaminant is listed in the table below:

<table>
<thead>
<tr>
<th>Analyte Class</th>
<th>Maximum $RSD_{hom}$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metals</td>
<td>5%</td>
</tr>
<tr>
<td>Silica</td>
<td>10%</td>
</tr>
<tr>
<td>Organic Solvents</td>
<td>5%</td>
</tr>
<tr>
<td>Asbestos</td>
<td>10% in square transformed state</td>
</tr>
<tr>
<td>Diffusive Sampler</td>
<td>5%</td>
</tr>
</tbody>
</table>

If AIHA PAT Programs alters these requirements, the subcontractor will be provided with three months notice in which to comply.

If two or more sub-batches are required to generate sufficient samples for a round, the analytical results of ten samples from each sub-batch must be compared statistically using the Statistical Tests for Batches. The subcontractor may request that AIHA PAT Programs review and approve alternate tests for homogeneity of variance and mean concentration levels between sub-batches. Such review and approval is at the discretion of AIHA PAT Programs.

Upon completion of each round’s QC, the subcontractor must determine that all final sample analytical results meet the performance criteria set forth in the final contract.

If submitting results for a PT round produced, the subcontractor shall ensure the analyst who analyzes and submits round data is different than the one who performed the homogeneity/concentration verification analysis.

### 4.3.5 Quality Assurance Plan
One month after contract award, the subcontractor must submit a Quality Assurance (QA) Plan to AIHA PAT Programs. The QA Plan must include a timetable for assembling the necessary equipment for proficiency sample preparation and any pilot studies required in the final contract. The QA Plan must detail the in-process checks that will be performed to assure quality production. This plan is subject to approval by AIHA PAT Programs prior to any sample preparation. AIHA PAT Programs’ approval of the QA Plan does not eliminate the subcontractor’s responsibility to provide samples that conform to the sample test specifications.
listed in the final contract.

4.3.6 Sample Storage and Stability
Records maintained for storage conditions must be provided to AIHA PAT Programs.

Proficiency test items shall be demonstrated to be sufficiently stable to ensure that they will not undergo any significant change throughout the conduct of the proficiency testing round, including storage and transport conditions.

4.3.7 Recordkeeping
The subcontractor must provide batch production records, analytical records, and associated calibration records used in producing reference samples upon completion of the production of the samples. AIHA PAT Programs, or its designee, may witness any phase of sample production, analysis, or kit preparation. Technical records relating to each proficiency testing round are retained for a minimum of three years in accordance with the AIHA PAT Programs Record Control Procedure.

4.3.8 Security
The subcontractor is to preserve the security of proposed concentration levels, proficiency materials, and data for all sample generation, quality control, and sample characterization/verification. Summary Analytical Reports are to be made available electronically only to those representatives of AIHA PAT Programs as stipulated in the final contract.

4.3.9 Confidentiality
The information contained in this request for proposal (RFP), and any correspondence or other written or oral communication regarding this RFP, is confidential.

The subcontractor shall receive proficiency testing information and related documents with reference to participants or other contractors for the express purpose of the subcontracted proficiency testing activities that may be intellectual property, proprietary or confidential business data or information (the Information). The Information may be written, oral, or recorded or contained on tape or on other electronic mechanical or visual media and shall include any notes, or summaries made by the Recipient received or prepared in connection with its participation in the AIHA PAT Programs. As it relates to the target concentration, assigned value, and/or expected result the Information shall be kept confidential to protect against participants gaining an advantage from early disclosure.

The subcontractor shall abide by the following AIHA PAT Programs policy regarding disclosure of the above-described Information, for a period of ten (10) years thereafter:

- To safeguard and keep confidential the Information;
- To hold such Information in strict confidence and use practices no less stringent than those used to protect your employer’s own confidential Information;
- To use the Information only for the purposes of providing services for subcontracted activities or scientific input to AIHA PAT Programs; and,
- Not to disclose such Information to any third party, except:
  - To any governmental body having jurisdiction pursuant to a request therefore or as may be required by law;
  - As otherwise may be required by law;
  - To legal counsel representing either party; or
AIHA Proficiency Analytical Testing Programs
3141 Fairview Park Drive, Suite 777
Fall Church, VA 22042 USA
main 1+703-846-0757 fax 1+703-207-8558
Email: info.PATLLC@aiha.org Web: www.aihapat.org

- To members of AIHA PAT Programs’ consultants/contractors who have a need to
  know such Information in connection with work in support of the AIHA PAT
  Programs’ activities and who have signed a Confidentiality and Conflict of interest
  Agreement binding them to keep the Information confidential and filed the signed
  Agreement with AIHA PAT Programs.

AIHA PAT Programs further requires the subcontractor to use such Information only in
furtherance of the purposes of the final contract and not for personal benefit or any third party’s
benefit.

If for any reason a subcontractor’s services are discontinued, the terms within the final contract
shall nevertheless survive. However, these obligations shall not apply to Information which:

- At the time of disclosure to the subcontractor is already in the public domain by
  publication or otherwise;
- Subsequent to the disclosure to the subcontractor becomes generally known to the
  public through no fault of subcontractor;
- Is rightfully disclosed, on a non-confidential basis, to the subcontractor by a third party
  who had not obtained such Information directly or indirectly from AIHA PAT Programs;
- Is demonstrated to have been in the possession of a subcontractor prior to its disclosure
  to the subcontractor by AIHA PAT Programs, and was not obtained directly or indirectly
  from AIHA PAT Programs; or,
- Is independently developed by the subcontractor without access to the Information.

4.3.10 Conflict of Interest/Non-Compete Agreement
The subcontractor is to avoid actual, apparent, and/or perceived conflicts of interest, including
competitive work that would interfere with their ability to fulfill their responsibilities to AIHA PAT
Programs. The subcontractor is encouraged to follow ethical standards, to be in compliance
with all laws, and to avoid any conflict of interest, or appearance of such, including having their
titles or affiliation used to publicize personal or company activities, programs, or events
(especially those conducted for private profit). The subcontractor shall immediately inform the
AIHA PAT Programs’ Director of such conflict of interest or potential conflict of interest.

4.3.11 Additional Analytes and Reference Materials
AIHA PAT Programs retains the right to request changes to the sample generation procedures
and additions to the list of analytes.

4.3.12 Production of Additional Samples
The subcontractor shall generate all reference samples required for the IHPAT Program. The
minimum quantity of IHPAT sample sets to be generated will be specified in the final contract.
Should additional samples above the contract minimum be required, the Director, Manager, or
designee, of AIHA PAT Programs shall specify the exact quantities of sample type to be
produced at least three months prior to scheduled shipment. The subcontractor must prepare at
least ten additional sets of each sample analyte type and each generation batch for internal
subcontractor verification. These additional sets are not included in the quantities required by
AIHA PAT Programs to meet the needs of current participants. These additional samples must
meet all testing requirements as outlined in the final contract for the PT samples.

4.3.13 Packaging and Shipment of Kits
The subcontractor shall generate, package, and distribute IHPAT proficiency test samples to
each participant each year according to the AIHA PAT Programs annual schedule, available at
IHPAT sample kits shall be packed to include only those sample analytes that each participant analyzes. AIHA PAT Programs will provide the subcontractor with (1) a summary of packing requirements, and (2) participant mailing addresses. The subcontractor will be responsible for preparing shipping labels.

Domestic (US) participant sample kits shall be shipped via a carrier that will ensure delivery in a timely manner. The subcontractor pays all shipping costs.

International shipments will be sent by AIHA PAT Programs’ courier service. The cost of sending all international kits to the courier will be borne by the subcontractor as a one-off shipment per round. The shipment shall arrive to AIHA PAT Programs’ courier service at least 2 business-days prior to the shipment of domestic samples.

The subcontractor shall package all kits in such a manner as to prevent loss of analyte from the sampling media during shipment. The subcontractor shall also include the appropriate analytical report form(s) in each kit. Shipping containers and labeling of kits is subject to AIHA PAT Programs’ approval.

The subcontractor shall retain those samples not delivered to participants as follows:

- A portion of each sample analyte type generated for the IHPAT program shall be retained by the subcontractor to mail to participants at the direction of AIHA PAT Programs for replacement of lost or damaged samples. Unused samples shall be stored by the subcontractor for distribution as required.
- The remaining extra IHPAT samples shall be stored by the subcontractor for sale by AIHA PAT Programs to participants.

Within the IHPAT program there are 20 possible combinations to be packed.

Participants in the IHPAT Program for metals who are also enrolled in the ELPAT Air program receive one set of metals samples and report data for both programs.

4.3.14 Identification and Management of Distributed Unsuitable Test Items

AIHA PAT Programs and the subcontractor shall confer regarding those test items whose homogeneity, stability, or integrity are found to be in question upon analysis by participants and/or statistical review by the AIHA PAT Programs’ Board and may result in potentially distributed unsuitable test items. Depending on the determined severity or scope of the issue affecting the test item(s), the subcontractor may conduct an investigation. Any corrective action reports generated as a result of the subcontractor’s investigation are sent to AIHA PAT Programs for review by staff and/or the PAT Board. For additional information, please request AIHA PAT Programs’ controlled document ID and Management of Distributed Unsuitable Test Items.

4.4 Documentation to be Provided

The subcontractor shall provide AIHA PAT Programs with:

- An electronic copy of the actual generation procedures and descriptions of generation systems used to produce IHPAT samples. The subcontractor shall send a copy of this document to any other interested parties as specified by AIHA PAT Programs.
- A Project Summary Report summarizing the results of in process quality control testing, standards and sampling medium testing, and reference sample verification for each IHPAT round.
- A representative to answer questions, in writing, concerning sample production and
testing and report on current project progress and possible problems. This information may be presented to AIHA PAT Board and shared with program participants.

- Written responses to requests for information from AIHA PAT Programs or AIHA PAT Board within two weeks of receipt of the question. Additional response time may be granted by AIHA PAT Programs as necessary.

### 4.5 Delivery Schedule and Period of Performance

#### 4.5.1 Delivery Schedule

The expected delivery schedule is provided below. The subcontractor is to provide the items listed by the deadlines specified. An electronic copy of each item is to be submitted to Director of Operations, AIHA PAT Programs at aoler@aiha.org.

<table>
<thead>
<tr>
<th>Item</th>
<th>Due Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality Assurance Plan</td>
<td>September 15, 2017</td>
<td>Electronic copy only</td>
</tr>
<tr>
<td>Draft Generation Procedures</td>
<td>September 15, 2017</td>
<td>Electronic copy only</td>
</tr>
<tr>
<td>Final Generation Procedures</td>
<td>October 30, 2017</td>
<td>Electronic copy only</td>
</tr>
</tbody>
</table>
| If four IHPAT rounds per year             | January 1  
April 1  
July 1  
October 1  
First round under this contract is expected to be January 1. | Specified by PAT Programs |
| If two rounds per year of diffusive samples | January 1  
July 1  
First round under this contract is expected to be January 1. | Specified by PAT Programs |
| If three IHPAT rounds per year            | January 1  
May 1  
September 1  
First round under this contract is expected to be January 1. | Specified by PAT Programs |
| Project Report summarizing sample production | Two weeks after delivery and verification for each round | Electronic copy only |
5 INSTRUCTIONS TO BIDDERS

5.1 General Instructions

AIHA PAT Programs reserves the right to make an award based on the initial proposals received without discussion of such proposals. It is important, therefore, that the proposal be submitted on the most favorable terms from both technical and price or cost standpoints.

The proposal must be prepared in two parts: a technical proposal and a business proposal. Both parts must be separate and complete documents unto themselves so that evaluation of one may be accomplished independently of the other. The technical proposal must not contain reference to costs, however, resource information, such as data concerning the labor hours and categories of labor, materials, etc., must be contained in the technical proposal so that the bidder's understanding of the scope of work may be evaluated. The proposal must disclose specific technical approaches in sufficient detail to provide a clear and concise presentation that includes, but is not limited to, the requirements of the technical proposal instructions.

The proposal must be signed by an official authorized to bind the bidder's organization. An electronic copy of the technical proposal and the business proposal must be submitted to:

   Angela Oler, Director of Operations, at aoler@aiha.org

AIHA PAT Programs shall be providing a copy of the technical proposals received to the AIHA PAT Programs Board for technical review.

The proposal submitted in response to this RFP may contain data (trade secrets, business data, commercial information, financial information, cost and pricing data, and technical data) which the bidder does not want used or disclosed for any purpose other than for evaluation of the proposal. The use and disclosure of any data may be so restricted.

AIHA PAT Programs assumes no liability for disclosure or use of unmarked technical data and may use or disclose the data for any purpose and may consider that the proposal was not submitted in confidence.

AIHA PAT Programs reserves the right to reject any or all proposals received. AIHA PAT Programs reserves the right to not review or consider any proposal received after the exact time specified for receipt.

Proposals may be withdrawn by the bidder by written notice to Angela Oler, Director of Operations, at aoler@aiha.org at any time prior to award.

5.2 Technical Proposal Instructions

The proposal must set forth specific and detailed explanations of the proposed technical approach in conjunction with the tasks to be performed in achieving the project objectives. A detailed work plan must be proposed indicating how each aspect of the scope of work is to be accomplished. The bidder's technical approach must be presented in sufficient detail to fully explain the proposed technical approach and methods. The technical proposal must reflect a clear understanding of the nature of the work being undertaken.

The technical proposal must include information on how the project will be organized, staffed, and managed. Information must be provided that demonstrates the bidder's understanding and management of important events and tasks. The technical proposal must include a list of names and proposed duties and responsibilities of the professional personnel assigned to the project. A definite line of responsibility for preparation of the samples must be demonstrated.
Resumes and Summary Biographies (one to two paragraphs) must be included and must contain information on education, background, training, recent experience, and specific scientific and technical accomplishments. The approximate percentage of time each individual will be employed on the project must be included. The proposed staff hours for all individuals must be allocated against each task or sub-task for the project.

The technical proposal must provide the general background, experience, and qualifications of the organization. Similar or related contracts, subcontracts, or grants should be included. The name of the customer, contract or grant number, dollar amount, time of performance should be provided for consideration. AIHA PAT Programs reserves the right to request that the bidder provides the names and telephone numbers of these customers in order to conduct reference checks.

The technical proposal must contain a discussion of present or proposed facilities and equipment that will be used in the performance of the contract. The detailed discussion of proposed sample generation and contamination control methods must be addressed by all bidders when submitting proposals.

The organization must also demonstrate knowledge of and conformance to both the current version of ISO/IEC 17043, Conformity assessment -- General requirements for proficiency testing, and ISO/IEC 17025, General requirements for the competence of testing and calibration laboratories.

5.3 Business Proposal Instructions

The bidder must submit, as a minimum, business proposals fully supported by evidence of financial stability and sufficient resources to guarantee a viable business life extending over the proposed life of the contract, including possession of the necessary financial capacity, working capital and other resources to perform the contract without assistance from any outside source.

The bidder must submit a cost quotation that includes at a minimum:

- Five years of cost quotations
- Cost breakdown for each analyte class samples (e.g., Metals, Organics, Fungi, Lead in Paint, etc.)
- Any kit preparation, processing, and/or shipping fees
- Ranges for quantity discounts
- Costs for individual samples outside the scheduled rounds
- Provide information needed to understand the total round fees and total yearly fees

It is recommended that the cost quotation be submitted in tabular form.

EXAMPLE:

<table>
<thead>
<tr>
<th>Minimum Quantities</th>
<th>Item/Analyte Set</th>
<th>Price per Item/Analyte Set</th>
<th>Price per Round*</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>Kit Fee (Analyte Class 1, Analyte Class 2, etc.)</td>
<td>at $5</td>
<td>$500</td>
</tr>
<tr>
<td>50</td>
<td>Analyte Class 1</td>
<td>at $5 (quantities 51-100 at $4; 101-150 at $3)</td>
<td>$250</td>
</tr>
<tr>
<td>35</td>
<td>Analyte Class 2</td>
<td>at $5</td>
<td>$175</td>
</tr>
<tr>
<td>75</td>
<td>Analyte Class 3</td>
<td>at $5</td>
<td>$375</td>
</tr>
<tr>
<td>100</td>
<td>Analyte Class 4</td>
<td>at $5</td>
<td>$500</td>
</tr>
<tr>
<td></td>
<td>Total Minimum Price Per Round</td>
<td></td>
<td>$1,800</td>
</tr>
<tr>
<td></td>
<td>Total Price for 3 Rounds/year of Minimum Quantities</td>
<td></td>
<td>$5,400</td>
</tr>
<tr>
<td></td>
<td>Total Price for 4 Rounds/year of Minimum Quantities</td>
<td></td>
<td>$7,200</td>
</tr>
</tbody>
</table>

* Price per Round includes kit preparation, processing, handling, storage, shipping, etc.
5.4 General Administrative Requirements

The proposal must include:

- A statement indicating the length of time that the proposal conditions and costs are firm once received by AIHA PAT Programs.
- The name and telephone number of the person who prepared the bidder's Technical and Business Proposals.
- The name and telephone number of the person authorized to conduct negotiations.
- The name and location of the facility or place of business where the project will be performed:
  - Name of bidding organization
  - Name, title and signature of Individual authorized to sign
  - Date submitted
  - Address of bidder
  - Type of organization (Individual, state or local agency, partnership, joint venture, non-profit, educational institution, or corporation including the state of incorporation)
- Employer's tax identification number