REQUEST FOR QUALIFICATIONS:
BIOREPOSITORY AND SPECIMEN STORAGE
CONSULTANT

The Public Health Institute (PHI) seeks a qualified consultant to serve as an advisor to support the
development of a long-term solution for storing biospecimens from the Child Health and
Development Studies program. Specifically, the consultant will provide recommendations on the
type and manner of storage needed for the specimens; approach and method of specimen transfer and
advise on best practices to manage and facilitate the robust stewardship and storage of these
specimens. The consultant’s work will be informed by the historical storage solutions for the CHDS
data, unique features of the specimens’ patterns and use as well as the consultant’s knowledge of
industry standards and best practices.

Responses due: Friday September 8, 2023, at 5 p.m. (PST)
Location of initiative: PHI’s headquarters are in Oakland, California. PHI is home to 60+ programs
working across the United States and around the globe. PHI staff work remotely. Travel to Oakland is
not anticipated at this time but may be requested if circumstances require in person meetings. Travel
expenses, if any, will be reimbursed in accordance with PHI’s travel policies and procedures.

Estimated Period of Performance: September 22, 2023, to August 30, 2024.

BACKGROUND

PHI is dedicated to improving health and wellness by discovering new research, strengthening key
partnerships and programs, and advancing sound health policies. As one of the largest public health
institutes in the United States, many of PHI’s programs focus on promoting health equity, well-being,
and quality of life for people around the world through innovative solutions and collaborative
partnerships. During its more than 50 years as an independent nonprofit, the Public Health Institute has
led and managed hundreds of projects and programs ranging from small task order contracts to large,
multi-site research programs with national and international significance.

One of PHI’s longstanding programs is the Child Health and Development Studies (CHDS). Beginning
in 1959, over 15,000 families enrolled in a study focused on pregnancy and early child development.
This cohort, CHDS is now joined by the CHDS children, now adults, and their children (CHDS
grandchildren). These intergenerational cohorts provide a unique opportunity for scientists to investigate
the relationships between biologic, behavioral, social, genetic, and environmental factors in early family
life to health outcomes in adults. Their studies have been published in prestigious peer-reviewed
journals, and in national media such as the New York and LA Times.

Available data ranges from interviews to a comprehensive set of biospecimens for each participant.
(mothers, fathers, children, and grandchildren). Each participant has multiple aliquots of serum, plasma, buffy coats, red blood cells, clots, whole blood, and blood smears as well as urine and saliva.

We are seeking the services of a qualified company/professional to provide guidance and recommendations for a long-term storage solution for the CHDS biospecimens.

**SCOPE OF WORK**

PHI is looking for an external consultant to partner with and advise PHI research and program leadership with approaches and recommendations to develop a long-term strategy for the storage of the CHDS biospecimens.

The purpose of this Request for Qualifications (RFQ) is to identify a qualified and experienced company/individual to carry out the following critical components necessary to secure a long-term solution:

1. Identification of a storage facility(ies) with the capacity to store the specimens in a cost-effective manner and with diversification and enhanced safety.
2. Identification of a shipping company that specializes in specimen packaging and transfer.
3. Assessment of the viability of the specimens prior to shipment and the appropriate plan to ensure proper and safe transfer of specimens.

Additionally, the consultant can participate as a thought leader and subject matter expert for the PHI leadership, assisting as needed in but not limited to budget development for specimen transfer and storage, contract review and negotiation, and specimen preparation oversight and compliance, if budget allows.

**DELIVERABLES**

The below represent the minimum deliverables.

- A short list and recommendation of appropriate biorepositories that have the capacity to provide long-term storage for the specimens. In addition, these identified biorepositories must be cost-effective, safe and can incorporate the existing protocols for requests for specimen usage.

- A short list and recommendation for best-in-class shipping vendor(s) that can move the specimens to their new location.

- A set of best practices and recommendations in specimen preparation for transfer that includes assuring viability of specimens, transferring the LIMS inventory from one system to another, mode of transfer (type of container, etc.).

- An approximate budget(s) associated with the recommendations and best practices for the above.

- Final report summarizing inputs provided and recommendations for PHI and any resulting collateral materials or instruments developed during the consulting engagement.
QUALIFICATIONS

Desired characteristics of the organization or individual submitting a proposal are as follows:

- Deep and demonstrable understanding of biorepository industry standards and best practices.
- Advanced degree in an applicable scientific discipline or health-related field.
- 8+ years relevant industry experience, with prior experience tracking/managing specimens and/or associated data in a clinical/diagnostic laboratory setting, or pharmaceutical/biotechnology R&D environment.
- Prior direct experience interfacing with and managing specimen transport vendor(s).
- Prior responsibility for administrative and technical operations of a biorepository, including performing a wide range of routine and specialized duties for diverse human biospecimens.
- Prior experience with and excellent proficiency in Laboratory Information Management Systems (LIMS) and specimen management/tracking software and systems is required.
- Ability to identify and resolve complex specimen related problems.
- Prior responsibility of coordinating and managing procurement, budgeting, and arrangement of necessary resources.
- Expertise in compliance with safety and OSHA requirements. Membership in ISBER and application/knowledge of ISBER standards and best practices preferred and advanced knowledge of CFR, ICH GCP, and other guidance related to specimen collection, transport, processing, handling, retention, and analysis.
- Strong interpersonal, communication, and presentation skills including experience with developing recommendations and strong writing skills.
- Previous experience working in a similar consultative role a plus.
- Experience with/knowledge of fiscal sponsor and/or philanthropic organization models a plus.

TIMELINE

The successful bidder should be able to begin working within 30 days of notification of selection and provide an expected timeline to complete all services.

PROPOSAL FORMAT:

Responses to this RFQ should not exceed 10 pages in total. Submit proposal to: clomonaco@phi.org.

The bidder’s proposal must provide a detailed response and supporting documentation, where requested, to each of the following areas:

Cover Letter and Contact Information. A cover letter supporting interest in this RFQ and Scope of Activities, including the name, title, and contact information for the primary contact for the bidder.

General Qualifications. Provide a summary of you or your firm and its culture and a description of key staff proposed to be assigned to PHI (a CV or resume(s), brochures and marketing materials may be included as an appendix but should not take the place of a brief written response) (maximum of 2 pages).
• Please include the capabilities and past related performance of the bidder and a description of experience and expertise serving clients in the non-profit arena or those clients within the biorepository space.

• A description of you or your firm’s commitment to diversity and inclusion and understanding of the importance of addressing racial and gender equity and to advancing racial justice in order to improve health outcomes.

• Please include all the services that are offered to your clients.

Technical Qualifications & Experience (maximum 3 pages).

• Include a description of your experience and expertise, focusing on the desired qualifications stated in this RFQ.

• If the bidder is a company, provide a brief description of key personal experience proposed to be assigned to this work.

Proposal/Proposed Approach. A description of the bidder’s proposal and/or approach to the services outlined in the Scope and Deliverables section of this RFQ (maximum of 3 pages).

Cost/Fee Schedule. Describe your proposed form of compensation (i.e., commission, annual retainer, fee-for-service) and fee schedule and/or fixed burdened hourly rates by person/role proposed to fulfill the scope of work and deliverables as outlined in the RFQ.

References. Please provide a list of three to five references (including name, title, email, phone) to validate past performance.

SUBMISSION GUIDELINES:

Confidentiality. All non-public information concerning this RFQ, including any related information that is subsequently disclosed by respondent during the proposal process, is respondent's confidential information. PHI will not disclose any non-public information or use it for any purpose other than responding to the RFQ without respondent's prior written consent, except as required by law. Submission of a proposal constitutes acceptance of these terms.

Discretion and Not Binding. This RFQ is a solicitation for proposals only and neither the issuance of this RFQ nor the submission of a responsive proposal shall be binding on PHI. PHI reserves the right to accept or reject any or all proposals, or to cancel this RFQ for any reason or no reason at any time. No binding agreement shall exist with respect to the provision of services for the Project Description, unless and until a definitive agreement has been fully executed in writing by both PHI and the selected respondent. PHI shall not be liable under any circumstances for any expenses incurred by any respondent in connection with the RFQ, proposal submission or selection process.

Pricing. Prices must be inclusive of all costs, including taxes and fees, in U.S. dollars. Rates should remain valid for 180 days from submission.
Proposal Costs. There is no reimbursement for costs associated with preparing or submission of proposals in response to this RFQ or costs associated with possible award negotiation.

Right to Waive Re-Proposal. PHI reserves the right to waive irregularities and technicalities and request re-proposals.

Respondent Responsibility. The respondent shall be responsible for reading very carefully, and understanding completely, the requirements and the scope of work of the items contained in this RFQ.

Conflict of Interest. All respondents must disclose with their RFQ the name of any officer, director or agent who is also an employee of PHI. Further, all respondents must disclose the name of any PHI employee who owns, directly or indirectly, an interest of more than five percent (5%) in the respondent’s firm, subsidiaries, branches, or parent company.

Federal and State Tax. PHI is exempt from federal tax, state sales and service tax and state tax for tangible personal property. Respondents doing business with PHI shall not be exempted from paying sales tax to their suppliers for materials to fulfill contractual obligations with PHI, nor shall any respondent/contractor be authorized to use the PHI’s tax exemption number in securing such materials.

Contingency Fees. The respondent warrants that no person or selling agency has been employed or retained to solicit or secure a contract herewith for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees or bona fide established commercial or selling agencies maintained by the proposer for the purpose of securing business. For breach of violation of this warrant, PHI shall have the right to annul any resolving contract without liability or, in its decision, to deduct from the contract price without consideration or otherwise recover the full amount of such commissions, percentage, brokerage or contingent fee.

Compliant Proposals. Respondents are advised to study all instructions, requirements, and other information in this RFQ carefully. Respondents must:

- Comply with all requirements set out in this RFQ.
- Respond to each element in the order as set out in this RFQ.
- Include all supporting documentation as specified in this RFQ.
- Submit proposals as specified in this RFQ.

Proposal Evaluation. PHI will select the bidder(s) whose offer will provide the most favorable mix of corporate credentials and cost, thereby ensuring overall best value procurement. The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from PHI.

A respondent can receive a maximum of 100 points; scoring under 70 will not be considered responsive.

- Company/Individual Information/Past Experience (30).
- Proposed Approach/Services Provided (30).
• Cost/Fees (20).
• Credentials and References (15).
• Diversity and Commitment to Health Equity and Racial Justice (5).

DIVERSITY AND INCLUSION

PHI is dedicated to promoting diversity in its procurement of goods and services. Those with experience of root causes of disparities, inequities, systemic racism/sexism/other -isms are encouraged to submit a quote. Please also indicate if your company is certified as any of the following businesses:

• WOSB: Women-Owned Small Business.
• SDVO: Service-Disabled Veteran-Owned Business.
• HUBZone: Historically Underutilized Business Zone.
• SDB: Small Disadvantaged Business.
• 8(a)BD: African American, Asian Pacific American, Hispanic American, Native American, Subcontinent Asian American.