EI00253~2023RFP DRUG TESTING, HEALTH SCREENING & LAB SERVICES

SCOPE DOCUMENT

RESPONSE DUE DATE – WEDNESDAY, AUGUST 16, 2023 (1 PM ET)
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1. General Overview

1.1 Project Overview and Objectives

E&I Cooperative Services, Inc. (“E&I”) is requesting proposals for **Drug Testing, Health Screening & Lab Services** to result in a contracting solution for use by its Members. E&I is committed to utilizing purchasing and business practices in accordance with the National Association of Educational Procurement Code of Ethics.

The primary goals and objectives of E&I are to:
1. assist our Members to obtain the absolute lowest cost and best value that exceeds other public sector consortia agreements,
2. establish a strategic sourcing partnership with any selected manufacturer(s) and authorized dealers, and
3. enhance our position as the premier Procurement Cooperative for Education.

1.2 Contract Volume Estimates

Based on similar contracts, the estimated value of transactions resulting from contracts from this RFP is anticipated to be ~$180M across 5 years. The value potential has been determined based on market size and likely contract penetration. It is intended to be a directional input for our future business partners and not a volume commitment.


2.1 RFP Deadline

E&I will accept proposals submitted in response to this RFP only on the Jaggaer tool until 1:00 PM EST, on August 16, 2023 (the “Submittal Deadline”). The timeline for the RFP can be found in Section 2.2.

2.2 Tentative Schedule of Key Events

The following is a tentative schedule of events for this RFP:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Planned Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request for Proposal issued (“Open Date”)</td>
<td>07/17/2023</td>
</tr>
<tr>
<td><strong>5 PM ET Deadline</strong> for submission of RFP-related written questions (“Q&amp;A Submission Close Date”)</td>
<td>08/07/2023</td>
</tr>
<tr>
<td>E&amp;I Response to RFP-related questions</td>
<td>08/08/2023</td>
</tr>
<tr>
<td><strong>1 PM ET Deadline for Receipt of Proposals</strong> (“Close Date”)</td>
<td>08/16/2023</td>
</tr>
<tr>
<td>Evaluation and Supplier Clarifications Begin</td>
<td>08/17/2023</td>
</tr>
<tr>
<td>Negotiations Begin with Shortlisted Suppliers</td>
<td>09/20/2023</td>
</tr>
<tr>
<td>Anticipated Award(s)</td>
<td>10/11/2023</td>
</tr>
<tr>
<td>Acceptance and Execution of Agreement</td>
<td>10/25/2023</td>
</tr>
<tr>
<td>Implementation</td>
<td>11/01/2023</td>
</tr>
</tbody>
</table>

2.3 Evaluation Process and Criteria

Any contract(s) resulting from this Request for Proposal will be awarded in writing to responsive and responsible Respondents whose proposal, in the opinion of the evaluation team, offers the greatest benefit to our members when considering the total value including the quality, service levels, customer service and total cost (including any trade, prompt payment discounts, and other miscellaneous charges).

All proposals should be complete to be considered responsive.

As part of the evaluation process, E&I may require a demonstration/presentation before the award is made and the demonstration/presentation may be considered as an additional factor in the award. In addition, E&I may decide to make site visits, as needed, during the evaluation process which shall be coordinated with the respective Respondent(s).

The RFP evaluation team will review and evaluate RFP responses according to the following weighted criteria based on a total of 100 points.
<table>
<thead>
<tr>
<th>No.</th>
<th>Criteria</th>
<th>Criteria Overview</th>
<th>Points</th>
</tr>
</thead>
</table>
| 1   | Contract Alignment & Connection | ● Contract connection process to Member  
                              ● Contract channeling to E&I (direct, net new, etc.) | 10     |
| 2   | Supplier Diversity             | ● Certifications and Designations  
                              ● Company Program and Overall Commitment to Supplier Diversity  
                              Reporting, Metrics, & KPI’s | 10     |
| 3   | Supplier Capability            | ● Company Experience  
                              ● Service Capability  
                              ● E-Procurement  
                              ● Performance Tracking & Reporting  
                              ● Quality Management  
                              ● Training, Support & Account Management  
                              ● Compliance | 20     |
| 4   | Economic Value and Financial Overview | ● Contract Administrative and Marketing Fee (CAF)  
                              ● Financial Offer Requirements & Proposal  
                              ● Financial Reporting Capabilities | 25     |
| 5   | RFP Exceptions                 | ● Supplier Performance Expectations  
                              ● Compliance with RFP specifications  
                              ● Compliance with Master Agreement terms & conditions  
                              Compliance with Members’ institutional policies, federal, state, and local legal and regulatory requirements and policies | 10     |
| 6   | E&I Risk Profile               | ● RFP response quality  
                              ● Litigation  
                              ● Financial Health  
                              ● Existing contracts with direct competitors | 10     |
| 7   | Scope Questions                | ● Questions related to the scope of the RFP | 15     |

### 2.4 Sole Point of Contact for the RFP

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Educational and Institutional Cooperative Services, Inc.  
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E-Mail: zraza@eandi.org

Respondents to this RFP or persons acting on their behalf shall not contact any E&I employee, officer, or agent; any E&I Board of Directors; or any E&I Member concerning any aspect of this RFP, except in writing to the Sole Point of Contact, from the date of release of this RFP through the official award date. Violation of this provision may be grounds for rejecting a proposal response. See Section 2.7 in the Cover Letter on how to submit questions.
3. Scope of Products and Services

E&I is seeking proposals from qualified, experienced, financially sound, and responsible Drug Testing, Health Screening & Laboratory Services providers for its Members providing services including but not limited to laboratory drug testing programs of bodily fluids, tissues, samples and specimens, access to testing management solutions, supplies necessary to collect, seal and transport the specimens to the laboratory, shipping of the specimen to the laboratory, health screenings and checkups. E&I desires the broadest possible selection of services being offered over the largest possible geographic area and to the largest possible cross-section of E&I's current and future Members. The intent of this solicitation is to provide E&I Members with a comprehensive offering of services to meet their various needs.

3.1 Drug Testing Services

The supplier will provide the following testing services to our members, the suppliers are not mandated to provide all the testing services listed below and can choose only the ones they want to provide as a part of their proposal:

- **Diagnostic Testing Services**: Detection and identification of diseases or medical conditions in human samples, such as blood, urine, tissues, or genetic material. This includes tests for infectious diseases (including Covid-19), genetic testing, cancer screening, etc.
- **Drug Testing Services**: Focused on analyzing samples, such as blood, urine, hair, saliva and sweat to detect the presence of drugs or their metabolites.
- **Toxicology Testing Services**: Toxicology testing involves assessing the effects of chemicals, drugs, or other substances on human health. It can include tests to evaluate the toxicity of substances and potential adverse effects.
- **Clinical Pathology Services**: Clinical pathology services cover a wide range of laboratory tests related to human health, including hematology, chemistry, immunology, serology, and microbiology tests.
- **Immunology and Allergy Testing Services**: These services focus on evaluating a person's immune response, detecting allergies, and assessing immune system function.
- **Other Testing services**

3.1.1 Specimen Collection

Supplier will provide the collection services for E&I members and meet the highest standards in collections. Should instances arise where supplier’s collection sites are not able to service the member’s area the suppliers will sub-contract with an appropriate agency to service their location. Supplier will work with other nationally recognized firms to provide the most extensive collections network available. The following must also be ensured for specimen collection:

- The collection personnel must be trained and proficient according to SAMSHA and DOT/Non-DOT specimen collection standards. In addition, the collection site networks should be compliant with industry standards.
- The supplier should actively monitor the quality of service provided by its collection sites and personnel. The auditing process should be properly documented to confirm the use of appropriate collection procedures, and the overall professionalism related to the experience of our members.

3.1.2 Specimen Collector – Written Procedures

Upon request, supplier will provide detailed written procedures including but not limited to how to perform each type of specimen including quantity sample from member, proper storage, chain of custody documentation, and shipment to testing laboratory as instructed by the certified lab and any special packaging required.

3.1.3 Chain of Custody

If any litigation should arise due to the collection procedures or validity of a result, the supplier should have the ability to verify and validate the electronic record of the specific specimen collection and confirm that all collection protocols were followed correctly including the signature image, time, date, and who performed the collection.

3.1.4 Training for In-House Collections
A Supplier Representative will train the Members who prefer to perform the collection service. Supplier will train members on specimen collection, chain of custody procedures, specimen shipment to the lab, and reporting methods. The training should have Web-based modules as well as option to have face-to-face trainings.

3.1.5 Collection Specimens

The supplier’s network of collectors should have the ability to collect the specimens (eg. listed below). Please note that the type of specimen collection will vary by site.

- Blood
- Breath
- Hair
- Saliva
- Sweat
- Urine

3.1.6 Specimen Transportation

The supplier shall utilize a high-quality service to pick up and transport specimens to the laboratories. Specimen lab packs in transit should have the capability to be tracked at any time by the members when tracking numbers are recorded internally.

3.1.7 Adulterant Testing of Specimens

Vendor's Standard Operating Procedures (SOP's) require that each specimen be examined for signs of adulteration through physical examination and analytical examination.

3.1.8 Documentation, Storing and Securing Laboratory Test Results

The supplier shall retain all test results indefinitely in a secure, offsite location. These forms are to be stored in a secure warehouse accessible to authorized employees only. Storage of chain of custody forms should be in accordance with SAMHSA guidelines.

3.1.9 Medical Review Officer (MRO) Services

Upon request, Supplier’s MRO will review and make the final determination of the accuracy of a drug test, then report on both positive and negative test results.

3.1.10 Data Reporting and Integration

The supplier should have the capability to provide reporting through web-based portal.

3.2 Health Screening Services

The supplier should be able to provide health screening services and checkups to the members of E&I with services including but not limited to:

- Physical Exam
- Pulmonary Function Testing
- EKG
- Procto Exam
- Chest x-ray
- Fecal Blood Screening
- Laboratory Profile
- Rectal and Testicular Exam for men
- C-Reactive Protein
- Audiogram
- Dip Urinalysis
- CBC
- Mammogram
- Cardiac Risk Panel
- Thyroid Panel
- Rheumatoid Panel
- Cardiovascular Stress Test
- Blood Tests: Blood Collection, Laboratory Analysis
• Blood Tests: Blood Pressure Monitoring, Sphygmomanometer, Automated Blood Pressure Monitor
• Vision and Hearing Tests: Visual Acuity Test, Audiometry Test
• Other Relevant Health Screening Services

3.3 Laboratory Services
The supplier is to provide any other related laboratory services associated with the Drug Testing and Health Screening services offered as a part of the proposal including but not limited to MRO services, expert testimonies, Random Pool Draws and management.

3.4 No Exclusions
No products, or services provided by your company have been excluded from this RFP. All products, supplies and accessories carried in a Respondent’s catalog(s), price book(s) or otherwise available by special order are part of this solicitation.

4. Pricing
Supplier must complete the ‘Pricing Sheet’ and upload it on the Jaggaer tool. The first tab ‘Instructions’ in the ‘Pricing Sheet’ lists out the different sections and pricing requested by E&I. Please ensure to review the ‘Instructions’ tab before you start filling in the pricing.

5. Appendix

5.1 Definitions
The following are the definitions of general terms used in this RFP.

DAYS: All days specified are based on calendar days unless otherwise noted.


GO TO MARKET: Strategy or action plan specifying how the Respondent will utilize its inside and outside resources (e.g. sales force and distributors, marketing initiatives, etc.) to deliver its products and/or services to the Education market through an E&I contract.

<table>
<thead>
<tr>
<th>Contract Region Key</th>
<th>States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast</td>
<td>CT, MA, ME, NH, NY, RI, VT</td>
</tr>
<tr>
<td>Mid-Atlantic</td>
<td>DC, DE, MD, NJ, PA, VA, WV</td>
</tr>
<tr>
<td>Southeast</td>
<td>AL, FL, GA, KY, MS, NC, SC, TN</td>
</tr>
<tr>
<td>Central</td>
<td>AR, IA, KS, LA, MN, MO, ND, NE, OK, SD, TX</td>
</tr>
<tr>
<td>Great Lakes</td>
<td>IL, IN, MI, OH, WI</td>
</tr>
<tr>
<td>Western</td>
<td>AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY</td>
</tr>
</tbody>
</table>

GREATEST BENEFIT: The decision for award will be based on an overall combination of variables such as quality, price and various elements of required service that in total are optimal relative to the needs of the E&I Membership.

HIGHER EDUCATION: All Universities, Colleges, Healthcare Facilities (private and public), i.e., Associate, Bachelor, Master, and/or PhD in the United States, that provide for advanced learning and/or grant degrees. These Universities, Colleges and Healthcare Facilities may or may not be members of E&I.

HUBS: Historically Underutilized Businesses e.g., minority, women-owned businesses (for the State of Texas, Certified HUBS within the State of Texas).

K-12: All School Systems and Districts (private and public) in the United States that provide education for students in Kindergarten through 12th Grade. These School Systems and Districts may or may not be members of E&I.

MANUFACTURER: Indicates an entity that makes the products from raw materials outlined in this RFP, all of its agents, and employees.

MAY: Indicates something that is not mandatory but permissible/desirable.
MEMBERS: Includes Institutions, Universities, Colleges (private and public) and K-12 schools that are listed in the E&I record.

MONTH END: Shall mean the last calendar day of each month.

MOST RESPONSIBLE: A Respondent whose reputation, past performance, and business and financial capabilities are such that the Respondent would be deemed most capable of satisfying Member needs for a specific contract.

MUST, SHALL, WILL: The words “shall,” “must,” or “will” are equivalent and indicate mandatory requirements or conditions. E&I will not waive Responder’s material deviation from any of the mandatory requirements.

RMWBE: Minority, Woman-owned Business Enterprises.

NATIONAL AGREEMENT: E&I awards an Agreement which is available throughout the United States (including Alaska and Hawaii).

REGIONAL AGREEMENT: E&I may elect to award an Agreement by Geographical Areas of the United States. See table below for geographic breakdown:

RESPONDENT: Entity who submits a proposal to an RFP.

RESPONSIBLE: A Respondent is responsible if they are capable or qualified to perform the work.

RESPONSIVE: A proposal is responsive if it meets all of the requirements of the RFP.

SHALL, MUST, WILL: Indicates a mandatory requirement(s) that must be addressed. Failure to address these mandatory requirements will result in rejection of your proposal as non-responsive. E&I may, but is not required to, reserve the right to request additional information.

SHOULD: Indicates something that is recommended but not mandatory. If the Respondent fails to provide recommended information, E&I may, at its sole option, ask the Respondent to provide the information or evaluate the proposal without the information.

SOLE POINT OF CONTACT: The Contract Manager or designee to whom Respondents shall address any questions regarding the solicitation or award process. The sole point of contact shall be the arbitrator of any dispute concerning performance of the Contract.

SUCCESSFUL RESPONDENT: The Respondent(s) or individual(s) who are the recommended recipient(s) of the award of a contract under this RFP (also synonymous with “Payee,” “Offeror,” “Contractor,” “Vendor,” and “Supplier”). If a Respondent is a manufacturer, its certified dealers and resellers may also furnish products under the Contract; in choosing to do so, the dealers and resellers agree to honor the Contract and the term “contractor” shall be deemed to refer to them. Unless awarded the Contract as a direct Respondent, however, dealers and resellers are not parties to the Contract, and the Respondent that certifies them shall be responsible for their actions and omissions.

SUPPLIER: Indicates an entity that distributes/furnishes the products and or services of a company, all of its agents, and employees. For the purposes of this RFP, the terms Supplier and Respondent may be used interchangeably.