

July 13, 2020

# Request for Proposal

This is a request for proposals to establish and maintain warehousing and fulfillment services for the American Association of State Highway and Transportation Officials (AASHTO).

## I. Background

AASHTO is a nonprofit, nonpartisan association representing highway and transportation departments in the 50 states, the District of Columbia, and Puerto Rico. It represents all five transportation modes: air, highways, public transportation, rail, and water. Its primary goal is to foster the development, operation, and maintenance of an integrated national transportation system. AASHTO works to educate the public and key decision makers about the critical role that transportation plays in securing a good quality of life and sound economy for our nation. AASHTO serves as a liaison between state departments of transportation and the Federal government. AASHTO is an international leader in setting technical standards for all phases of highway system development. Standards are issued for design, construction of highways and bridges, materials, and many other technical areas. As part of that service to the state departments of transportation, AASHTO develops, produces, and distributes technical products and services to its members and the transportation industry.

Vendors can review AASHTO's products and services at <https://store.transportation.org>.

## II. Goals

AASHTO recognizes that maintaining a cost-effective operation is dependent not only upon an efficient warehouse and fulfillment operation, but also the overall management of merchandise flow and the establishment and installation of systems that eliminate redundancy, provide automated economies, and provide the means for effective management and distribution of products. It is expected that the successful vendor will partner with AASHTO to reduce costs and maintain superior customer service and satisfaction, and will deploy cutting-edge technology to maintain efficient and economical fulfillment services to assist the organization in generating technical product sales.

Therefore, AASHTO is seeking a provider of integrated call center, customer service, data entry, financial processing, fulfillment, and warehousing services for AASHTO's publications and training programs. This level of support requires top-notch inventory control, distribution, reporting, and customer service systems.

### **III. Annual Volumes (past 12 months of current fulfillment service)**

- **Call Center/Data Entry and Fulfillment**

- Order Volume
  - Internet Orders: 7,139
  - Email Orders: 425
  - Phone Orders: 111
  - Mail Orders: 19
  - Fax Orders: 8
- Method of Payment
  - Invoice/Statements: 532
  - Credit Card Orders: 6,812
  - Check Orders: 10
- Rush Orders: 113
- International Orders: 636
- Backorders: 52
- Account-Dedicated CSRs: 2–3

- **Inventory Management**

- Number of Printed Titles: ~100
- Number of Digital Titles: 1,158
- Number of New Titles Published/Year: 25-40
- Number of Online Training Courses: 307
- Number of New Online Training Courses Offered/Year: 20–30
- Receiving Units: 23,073
- Pallets in Inventory: 190
- Number of Shippable Orders: 2,362
- Line items: 3,710
- Average Line Items/Order: 1.6
- Average Pieces/Order: 3.77
- Number of Returns/Year: 39

### **IV. Required Services (proposals must address all)**

- Call Center, Data Entry, and Customer Support
- Accounting and Invoicing Services
- Integration with AASHTO's Online Store/Shopping Cart
  - Real-time Order Processing, including Credit Card Processing and Authorization
- Distribution/Shipping/Tracking
- Inventory Storage Management/Quality Control
- Real-Time Reporting/Direct Access to Sales and Inventory Data
- Distribution of complementary publications to members

### **V. Supplemental Services (proposals may address some, none, or all and must provide AASHTO flexibility to determine which offered services to implement)**

- Turnkey Services, Web Store Front End, including:
  - Electronic publication distribution/delivery, either through your system or integration with AASHTO's existing system

- Integration with AASHTO's existing online training course delivery system
- Customization of pricing by customer group (member, non-member, educational, etc.)
- Distribution of complementary publications to members
- Printing: Short Run and/or Print-on-Demand
- List Management
- Marketing Services/Loyalty Programs/Coupons

## VI. Requested Information

### • Company Profile

Describe your company, year established, ownership, types and size of client organizations, location and hours of operation, total staff, and total service offerings. Please comment on your experience with publishing programs of associations, foundations, and/or non-profits.

### • References

Please provide a list of clients that you currently support who have similar business operations scenarios to that proposed in this RFP. Please indicate the length of time you have provided services to them, and the name and phone number of a contact person.

### • Phase-In Plan

Please outline your transition plan and estimated schedule of events for moving operations from previous fulfillment center to new location/operation. Please provide an estimated time line for this phase-in, including staff training time. Timeline must allow for full implementation of service no later than January 31, 2021. Costs will be noted below.

### • Pricing Schedule

Please provide fixed pricing in the format below (add any additional line items as necessary):

#### Monthly Fees:

Management	\$_____ /month
Client Relations Fee	\$_____ /month
Reporting Fee	\$_____ /month
Sales Tax Subscription Fee	\$_____ /month
Physical Inventory Fee	\$_____ /month
Bank Fees	\$_____ /month
Subtotal of Monthly Fees	\$_____ /month

#### Pallet Storage:

Per Pallet	\$_____ /location
Per Quick/Pick	\$_____ /location
Materials	\$_____ /package

#### Data Entry/Financial Processing:

Phone Orders	\$_____ /order
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Fax/Mail Orders	\$_____ /order
Internet Orders	\$_____ /order
Rush Orders	\$_____ /order

**IT Services:**

IT Programming Services	\$_____ /hourly
Real Time Credit Card Processing	\$_____ /each
Customer Record Storage	\$_____ /monthly
Local Phone for International Calls	\$_____ /each
800 Number	\$_____ /each

**Customer Service/Accounting Services:**

Credit Card Processing	\$_____ /each
Customer Service/Correspondence	\$_____ /each
Payments/Adjustments	\$_____ /each
Transfers to HQ	\$_____ /each
General Ledger	\$_____ /hourly
Refunds Processed	\$_____ /order
Collections	\$_____ /each

**Warehousing Support Services:**

Order Fulfillment	
- Per order	\$_____ /order
- Per piece	\$_____ /piece
Backorder Fulfillment	\$_____ /order
Receiving/Pallet	\$_____ /each
Receiving/Box	\$_____ /each
Receiving/Mixed Box	\$_____ /hour
Returns Processing	\$_____ /each
Customs Documentation	\$_____ /each
Trash/Recycle	\$_____ /each

**Special Project Rates:**

Computer Programmer	\$_____ /hour
System Analyst	\$_____ /hour
Operations Manager	\$_____ /hour
Warehouse/Project Manager	\$_____ /hour
Customer Service/Warehouse Clerk	\$_____ /hour
Rush Charges	\$_____ /hour

**Postage:**

How is postage charged?

## **VII. Schedule**

<b>RFP Distributed:</b>	July 13, 2020
<b>Questions Due:</b>	July 31, 2020
<b>Reponses Sent:</b>	August 10, 2020
<b>Proposals Due:</b>	August 28, 2020
<b>Review of Proposals:</b>	September 25, 2020
<b>Contract Awarded:</b>	October 16, 2020
<b>Completed Transition:</b>	No later than January 31, 2021

## **VIII. Submitting Your Proposal**

Please submit your electronic copy of your proposal and/or questions via e-mail to Erin Grady, Director of Publications at [egrady@aaashto.org](mailto:egrady@aaashto.org).

No proposal will be accepted after 4:00 p.m. EST, August 28, 2020. All materials submitted will become the property of the American Association of State Highway and Transportation Officials. All information provided by the vendor will be maintained as proprietary information.

Finalists will be selected from proposals received and will be asked to make a presentation at a date and location to be determined. Finalists must be prepared to make this presentation online, if required. Site visits may be conducted and references provided will be checked. AASHTO reserves the right to reject any or all submissions.