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**Customer Management  
Request for Proposal (RFP) on behalf of American Public  
Health Association (APHA)**

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AMERICAN PUBLIC HEALTH ASSOCIATION  
*For science. For action. For health.*

800 I Street, NW • Washington, DC 20001-3710  
202-777-2742 • [www.apha.org](http://www.apha.org)

**September 1, 2021**

**Confidential**

**Small Businesses and Minority Business Enterprises are encouraged to respond to this solicitation.**

EEO/AA. APHA is strongly and actively committed to diversity in its workplace.

The Equal Opportunity Clause required under Executive Order 11246, the affirmative action clause for disabled workers, set forth in 41 CFR 60-741.5, and the related regulations of the Secretary of Labor, 41 CFR Chapter 60, are incorporated by reference in this purchase order. By submitting an Invitation for Bid, vendor certifies that it complies with the authorities cited above, and that it does not maintain segregated facilities or permit its employees to perform services at locations where segregated facilities are maintained, as required by 41 CFR 60-1.8.

The parties hereby incorporate the requirements of the Notification of Employee Rights Under Federal Labor Laws; Final Rule, 29CFR Part 471, Appendix A to Subpart A, if applicable.

**Bidder requirements to participate.**

The Contractor shall maintain Commercial General Liability Insurance with limits sufficient to cover losses resulting from or arising out of Contractor action or inaction in the performance of the Contract by the Contractor, its agents, servants, employees or subcontractors, but no less than a Combined Single Limit for Bodily Injury, Property Damage and Personal and Advertising Injury Liability of \$2,000,000 per occurrence and \$2,000,000 aggregate. Media Liability must be in place and no less than 2,000,000 per occurrence and 2,000,000 aggregate.

The Contractor shall maintain Errors and Omissions/Professional Liability insurance with minimum limits of \$2,000,000 per occurrence and \$3,000,000 aggregate.

The Contractor shall maintain Automobile and/or Commercial Truck Insurance as appropriate with Liability, Collision and PIP limits no less than those required by the APHA where the vehicle(s) is registered but in no case less than those required by the District of Columbia.

The Contractor shall maintain Employee Theft Insurance with minimum limits of \$1,000,000 per occurrence.

Upon execution of a Contract with the APHA, Contractor shall provide APHA with current certificates of insurance, and shall update such certificates from time to time, as directed by APHA. Such copy of the Contractor's current certificate of insurance shall contain at minimum the coverages previously stated.

The Contractor shall require that any subcontractors obtain and maintain similar levels of insurance and shall provide APHA with the same documentation as is required of the Contractor.

## **Overview**

### ***Purpose***

The purpose of this document is to provide sufficient information to interested and qualified Customer Management suppliers to enable them to submit a proposal to provide the services outlined in this Request for Proposal (RFP).

This RFP is solicited by The Plimmer Group LLC on behalf of their client, American Public Health Association (APHA).

All information provided in this document is to be considered confidential and proprietary and is to be used only for the purpose of submitting a proposal. Confidentiality is particularly important. This document shall not be reproduced without the express written permission of **The Plimmer Group LLC**.

**The information in this document (pages 4-8) is provided to give a high-level perspective of this proposal. Please use it as a summary and only respond to the questions in the attached spreadsheet.**

### ***Introduction/Background***

APHA champions the health of all people and all communities. Their mission is to strengthen the public health profession. APHA speaks out for public health issues and [policies backed by science](#). They are the only organization that combines a nearly 150-year perspective, a [broad-based member community](#) and the ability to [influence federal policy](#) to improve the public's health.

#### **APHA Mission**

Improve the health of the public and achieve equity in health status.

#### **APHA Vision**

Create the healthiest nation in one generation.

#### **APHA Values**

[Our values](#) reflect the beliefs of our members from all disciplines of public health and over 40 countries.

APHA publishes the [American Journal of Public Health](#) and [The Nation's Health](#) newspaper. At our [Annual Meeting and Expo](#), thousands of people share the latest public health research. We lead public awareness campaigns such as [Get Ready](#) and [National Public Health Week](#). Together, they are creating the healthiest nation in one generation.

APHA is a 501(c)(3) organization.

The association utilizes multi-channel marketing to reach a wide variety of institutional customers. Channels include:

- E-commerce
- Direct Mail
- Telemarketing
- Partnerships
- Events

### ***The Association's Facts***

- 501(c)(3) organization.
- Founded in 1872.
- 1 Monthly Publication (Monthly)
- 1 Newspaper (10 Issues)
- 3 Subscription Books (Update Dependent)
- 750 Total Active (Domestic, Canada, Foreign) Subscribers
- 750-1,250 In-bound mail transactions primarily agency
- 1,000 In-bound web contacts
- 500-750 In-bound customer service calls
- 3,000 Domestic Out-bound Lettershop (Renewal, Invoices)

### ***APHA Business Overview***

The American Public Health Association publishes one journal—the American Journal of Public Health (AJPH), three subscription-based books, most notably the Control of Communicable Diseases Manual (CCDM) trilogy, also, Compendium of Methods for the Microbiological Examination of Foods (CMMEF) and Control of Communicable Diseases Laboratory Practices (CCDLP). In addition, APHA also publishes – The Nation's Health, which is APHA's official newspaper.

The scope of this RFP is directed to the fulfillment of all APHA subscriptions, and the small volume of ancillary products sold. In the event there are feature/function of your services that have not been addressed in the RFP that would apply please make those known.

It is also important to note that like many associations, APHA is in a continual process of business transformation. This will undoubtedly impact points of interdependency between the customer management functions and the associations' overall business initiatives.

The readers are served through a variety of media channels including, print and digital journals and their highly active website. APHA strives to forge long-term relationships between their readers and products. The requirement for exceptional customer service reinforces these relationships and has a direct impact on the organization's ability to maintain strong retention rates.

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It is important that we partner with vendors that will share in APHA's Core Values:

*Integrity:* We treat our customers and each other fairly, honestly and professionally.

*Customer Focus:* We exceed our customers' expectations by listening to and understanding their needs and delivering exceptional products and services.

*Creativity:* We explore challenges and opportunities from new angles and inspire creativity in and through our products.

*Excellence:* We produce the most accurate, helpful and reliable information. We are dedicated to the highest standards in all products and our customer service.

*Innovation:* We embrace new ideas and drive change.

*Teamwork:* We partner with each other to achieve common goals, make improvements and solve problems.

### ***Association's Customer Management Philosophy***

AJPH' approach to customer management is very progressive and will continue to push the envelope regarding innovative methods of managing and interacting with its customers. The organization believes it must align with a provider which best can demonstrate their past, present and most importantly their strategic plans for addressing the constant change in the marketplace.

The selected provider must be ready to be a true partner and guarantee that AHPA will be a participant in discussions of system and process strategies.

### ***Assumptions***

- Any vendor selected must have a flexible system with state-of-the-art customer management and distribution capabilities. In addition, the new supplier must be providing leading edge web/digital capabilities. Single customer view capability and ability to promote and manage bundled orders is particularly important.
- Solution must be flexible enough to establish business rules at various levels. Levels can include:
  - Global
  - Business Unit
  - Channel
  - Program
  - Promotion
  - Customer
- Client will have real time access to the system to review promotion set up, review orders and troubleshoot issues and apply transactions agreed to.
- Supplier will have user-friendly web-based and business intelligence-based reporting capabilities.

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- All active customers who have ordered within the last 60 months will be converted.
- All expires older than 60 months held to an 'Old Expire' file.
- Robust web development and reporting environment.
- Customer Service will be provided and supported by state-of-the-art technology.
- Data driven upsell and cross-sell functionality (web & voice).
- Orders can be placed for customers in the United States, Canada and Foreign.
- Monies will be managed in US dollars.

### **Scope**

The organization is conducting an RFP to identify a supplier capable of providing Journal Customer Management and Fulfillment functionality. The scope consists of the following:

Customer Management – The process of managing a customer from acquisition through file management to distribution. This includes:

- Transaction Entry
- Payment Processing (All payment types)
- Customer Record/Data Management (Single View of Customer)
- Reporting (Standard & Business Intelligence)
- Customer Service (Web, Phone, Email, Chat and Regular Mail)
- Distribution (Digital, Printer and Warehouse)
- Lettershop Services

Inventory/Warehousing - The process of storing and managing product. This process includes:

- Inventory Receipts
- Storage
- Inventory Management

Web Services – Services to support online interaction with client's customers. This would include:

- Site/Page Development
- User Interface
- Storefront
- Real time update to Customer Master File
- Web Authentication

### **Evaluation Criteria**

Vendors will be evaluated on the basis of written and possible in person presentations as well as site visits. In addition, the company may use information other than that provided by the vendor in its evaluation. Vendors will be evaluated against the following criteria:

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- Ability to meet requirements stated in the RFP.
- Quality and content of proposal and presentation
- Strong commitment to customer service
- Solution functionality/flexibility
- Experience and qualifications of the company and resources
- Proven business process methodologies and tools
- Experienced client services
- Strong account management
- Financial stability
- References and relevant project history
- Total cost

## Vendor and Proposal Requirements

*In addition to communicating your capabilities within the RFP, please include any other pertinent information that you believe differentiates the company from its competitors and distinguishes you as a provider. Especially include strategic plans for the future.*

**With respect to the requirements listed in the RFP please indicate if the requirement can be fully or partially met via existing functionality/capability or if an enhancement to the system is required.**

### Timeline

Task	Due Date
Send/Receive NDA from Recipients	August 30-31, 2021
Distribute RFP	September 1, 2021
Supplier Submits Clarification Questions By Email	September 2-13, 2021
TPG Responses to Questions by Email	As received but no later than September 13, 2021
Recipient Responses Due	September 17, 2021
Finalists Selected	October 8, 2021
Finalist Presentations (Site Visit)	October 13 - October 20, 2021
Supplier Selection	October 25, 2021

All communications and questions regarding this document should be directed to:

The Plimmer Group LLC  
Attn: Tim Plimmer  
[tplimmer@theplimmergroup.com](mailto:tplimmer@theplimmergroup.com)

All responses are due by 6:00 PM CST on September 17, 2021. Please provide an electronic copy as well as one (1) printed copy to the address below.

The Plimmer Group LLC  
Attn: Tim Plimmer  
9212 Greenbelt Drive,

Urbandale, Iowa, 50322

***Attachments***

**Document #1 (Excel) – RFP**

**Tab #1 RFP Questions**

**Tab #2 Relevant Magazine Data Profile**

**Tab #3 Service Level Requirements**