

OPTIMIST INTERNATIONAL

Request for Proposal

Supplies, Promotional Logo Products, and Apparel

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INTENT TO BID

ACCEPTANCE OF REQUIREMENTS, TERMS AND CONDITIONS

This RFP is confidential and the contents are not to be discussed with third parties or anyone in your company not directly engaged in this bid. Please conduct all communications with establish RFP lead for Optimist International, Connie Pellock.

By submitting your response to this RFP, it is assumed that the supplier agrees to the following terms and conditions:

- The proposal does not in any way obligate Optimist International or commit Optimist International to award a contract to the supplier.
- Optimist International is not liable for any supplier costs incurred in completing the RFP.
- Optimist International reserves the right to withdraw or terminate the RFP at any time.
- Business award is contingent upon the successful qualification and approval of the Supplier by Optimist International.
- Supplier agrees to keep proposal terms open and valid for 90 days after submission.

We have read and will comply with the above confidentiality statement and understand the above terms and conditions.

Please sign and return this form via fax or email to Connie Pellock before July 15, 2011
Fax: 314.371.6006
E-mail: Finance@optimist.org

Name Title

Date

Background and Scope:

Optimist International Introduction

Optimist International is an association of more than 2,900 Optimist Clubs around the world dedicated to "Bringing Out the Best in Kids." Adult volunteers join Optimist Clubs to conduct positive service projects in their communities aimed at providing a helping hand to youth. With their upbeat attitude, Optimist Club members empower young people to be the best that they can be.

Each Optimist Club is legally autonomous and determines the needs of the young people in its community and conducts programs to meet those needs. Every year, Optimists conduct 65,000 service projects and serve well over six million young people.

RFP Scope

Optimist International is seeking a supplier to not only provide supplies and promotional items but also partner with them to manage the overall program. This would include managing inventory, fulfillment, distribution, and customer service. The supplier is expected to develop and manage an online store that is tailored to the specific needs of Optimist Clubs. In addition to core stock items, custom items are occasionally ordered for special events or promotions. Individual Buyers or Optimist International would seek to work with the supplier to identify ideas that suit the occasion and price point.

RFPs may be submitted for various geographical combinations/markets:

Possible combinations for bidding:

1. Entire geographic market, which includes all USA, Caribbean and Canada

Or you may bid for one of the following geographic market(s):

2. USA and Caribbean
3. Canada
4. USA, Caribbean and English Speaking Canada
5. French Speaking Canada
6. English Speaking Canada

(To clarify, Optimist International may entertain winning bids for any combination above; i.e. Optimist International may select multiple providers.)

Evaluation and Selection Process

Optimist makes no volume guarantees. However, Optimist leadership has approved this process and is highly committed to the success of the program and driving compliance. Optimist will implement a process to proactively manage and monitor an awarded contract and work with the selected supplier to ensure mutual success.

The selection process will encompass a thorough analysis of the total value of the services provided and the viability of the supplier to be a long-term partner to Optimist International. Our selection will primarily be based on the following criteria (in no particular order):

- Customer Service
- Quality
- Online store and ordering capabilities

- Cost
- Ability to support multiple logos
- Creativity and Design

Our decision will be made on a total value basis, considering various process and cost benefits as well as other non-price advantages.

Questions Regarding the RFP

All questions related to this RFP and the bid process should be directed to Connie Pellock at Optimist International. Should your question be relevant to other bidders, the question and answer will be shared with all bidders. Finance@optimist.org or phone 314.371.6000 x 202.

Timeline

RFP Distribution- July 6, 2011

Intent to Bid Due- July 15, 2011

RFP Questions Due – July 31, 2011

Due Date for Completed RFP- August 15, 2011

COMPANY OVERVIEW AND GENERAL INFORMATION:

1. Company name, address, telephone & fax numbers, web-site address.
2. Primary contact name (including phone/fax numbers and e-mail address, if applicable)
3. Please provide three key customer references and one reference of a past customer (whose business you have lost in the last year). Include at least one company of similar size to Optimist International. Name, title, phone and email are required.
4. History (include total years in business, historical growth, mission statement, and any key industry innovations).
5. What is your ownership structure (public/private) and corporate profile (sole proprietorship, partnership, incorporated)
6. Has your company filed for bankruptcy in the last 10 years?
7. List any mergers/acquisitions and divestitures your company has completed in the past seven years.
8. List percentage of turn over of employees.
9. Provide your current number of employees (indicate the percentages of union and non-union employees).
10. How many national and international accounts does your company currently service?
11. Have you serviced an organization like Optimist International in the past? If yes, please elaborate.
12. What portion of your company's total business are national or international accounts/agreements?
13. How many customers do you service with multiple logos? How are those accounts managed? Who are those customers?

14. Detail your company's geographic coverage including all locations that are owned or leased by your company and specify what type of products/services are handled at each location.
15. Where are your current locations (i.e. – warehouses, fulfillment centers, design graphic locations, head quarters)?
16. Do you have in-house embroidery or screening capabilities?
17. Describe your ability to provide creative and graphics design support. Is any portion of the creative or production outsourced?
18. Identify your company's projection for future growth. What is your company's strategic investment plan for technology, warehouse capacity and location, manpower, etc.?
19. Are club supplies and logo products your company's core business? Are you involved in other products or services? If so, what is the breakdown by percent?
20. What unique features do you have that provide your company with a competitive edge in the promotional products industry?

QUALITY, PROCESS, AND COST IMPROVEMENT CAPABILITIES:

1. Describe your company's quality assurance program (i.e.-ISO Certification)
2. Provide the number of customer complaints in past year. Describe your escalation path for resolution.
3. List any awards or recognition your company has received.
4. Document any plans your company has to offset inflation, improve quality, delivery, technology, prices and cost, with guarantees, measures, and planned customer reviews, as appropriate.
5. Describe your replacement procedure and policy concerning defective and damaged items.
6. Optimal level of inventories MUST be readily available with supplier, without incurring surplus of inventory. Please outline your inventory management process.

INTEREST IN OPTIMIST INTERNATIONAL:

1. Please list any and all locations or divisions within Optimist International that you are currently doing business with or have done business with in the past. Please include contact information and the types of products and or services you are/were providing.

CUSTOMER SERVICE REQUIREMENTS:

1. Provide a brief description of your national or international service organization and service functions including hours of operation.
2. Provide an organizational chart that includes the names and titles of all personnel dedicated to the servicing of national accounts.

3. Key Account Management Team Biographies:
4. How many FTE's are dedicated to the following functions regarding the proposed services:
 - Call Center
 - Distribution
 - Information Technology
5. Selected Supplier must demonstrate that they have an appropriate amount of representatives to support all key locations and various needs and requirement throughout our clubs and districts. Please describe your proposal to fulfill this request.
6. How frequently will representatives be available to meet with our management at our location?
7. Describe how you will be able to ensure consistent service across all locations.
8. We require detailed monthly spend reports (preferably online). Describe what you currently offer now and provide examples.

ORDER PROCESSING & E-COMMERCE CAPABILITIES & REQUIREMENTS:

1. What annual volume do you do currently support with an e-commerce solution?
2. What is the minimum order quantity for merchandise online?
3. State the available methods for order placement. Will all orders be received by your company centrally or at various locations?
4. Describe the various order methods used by different locations or, if necessary, by the same location?
5. Assuming a product is in-stock, what is your standard order processing time from the time the order is placed until it is shipped?
6. How do you handle "rush" orders? Do you offer next day deliveries?
7. Supplier must agree to use Optimist International preferred shipping method / carrier. Account numbers to be provided by each business unit /location.
8. Describe your backorder policy/procedure.
9. List the various methods of payment you offer for internet ordering.
10. Does your company write and upgrade your own website or do you use an outside company?
11. Once identified, how quickly are errors corrected? What is your website's percentage of downtime?

12. Can you create a customized electronic catalog to meet Optimist International's specific content requirements? If so, is there any limit to the number of unique catalogs a customer can have? Provide examples.
13. Describe the approval process your system offers in terms of orders placed through purchasing cards shared by multiple Optimist International employees.
14. Describe your internet program's search features. Specifically list how our users can search for product to quickly find what they need. Provide screen shot examples.
15. Describe your online solution to track / report order activity for individuals or groups in terms of: dollar volume, products, order frequency, etc.
16. Does your e-commerce solution allow for interface with other procurement based shopping systems (i.e. SAP, Intellysis, Ariba, etc)? If so, how do you implement your solution? What is an average timeframe to complete this process?
17. Does your company provide automated order confirmation? If so, please describe.
18. What process does your company provide for informing customers of order status?
19. Please describe your disaster recovery plan.
20. What costs are involved with setting up and maintaining our websites?
21. Supplier may be required to implement a program in a short time period. Entire website would need to be revamped. Provide a timeline with implementation schedule for this process.
22. How will your organization spread the word that we have "Preferred" corporate supplier of choice that should be used for all promotional products?
23. Do you own your own distribution facility or do you outsource that to a 3rd party fulfillment company?
24. Do you have a formal social compliance policy? If so, please describe it.
25. How do you ensure that none of the products you sell us will be involved in a safety recall?

PRODUCT INFORMATION REQUIREMENTS:

1. Include a brief description of your top suppliers and top customers.
2. Describe how you will work with us to select merchandise for our program.
3. Describe your company's international sourcing capabilities, services and experience.
4. Describe your importing capabilities.
5. Do you employ the services of a dedicated customs broker?
6. Please describe your special order or custom order capabilities.
7. In what formats are you capable of accepting artwork?

8. What types of product decorating techniques do you offer?
9. Please describe some of the marketing service capabilities that you can provide your clients.
10. Describe your experience with building relationships with decentralized buyers.
11. What methods have you used to entice decentralized buyers to use your services?
12. Supplier must be able to offer an engraved plaque program with quick turnaround. Please describe your capabilities in this area.

INVENTORY MANAGEMENT REQUIREMENTS:

1. Discuss how your company will guarantee sufficient inventory to assure good service and prompt delivery.
2. How many different logo items would you stock pre-imprinted with the Optimist International and/or affiliated brand?
3. How does your company determine initial inventory levels?
4. Supplier will be required to have real time access to inventory information?
5. How does your company manage/liquidate discontinued or slow moving inventory?
6. What is your capability/experience for merchandising a company retail stores? Please provide examples or case studies.

DELIVERY, RESPONSIVENESS, AND RETURN POLICY REQUIREMENTS:

1. Describe your shipping process and list your methods of delivery. Discuss your international shipping capabilities.
2. What options do you offer for packing list information? Please provide examples.
3. How are deliveries confirmed and documented?
4. Provide your performance for the past 12 months for on-time delivery.
5. How do you guarantee that required delivery dates will be met? For lost and errors found in shipment, what corrective action is taken?
6. Would supplier be willing to utilize Optimist International contracts with logistic companies?
7. Explain your company's processes (options) and policy for handling merchandise to be returned for credit. If more than one option, your preferred method for handling returns and identify any return freight or restocking charges that would apply?

BILLING AND FINANCIAL REQUIREMENTS:

1. Describe your billing methods and capabilities, including bill consolidations and billing by individual cost centers.

2. Does your company have the ability to invoice monthly with a detailed summary or transmit EDI files for auto invoice posting instead of invoicing per each shipment?
3. Supplier must be capable of handling orders from customers who prefer to use a credit card. Which credit cards do you accept?
4. Is your company capable of using "ACH" as a form of reimbursement?