

REQUEST FOR PROPOSALS
CAMPAIGN MANAGEMENT ORGANIZATION
FOR
CITY OF PHILADELPHIA EMPLOYEES' COMBINED CAMPAIGN

Purpose

The City of Philadelphia Employees Combined Campaign (Campaign) is an annual charitable solicitation drive to raise funds for nonprofit organizations serving the health and human service needs in the nine-county Philadelphia Metropolitan area (Philadelphia, Bucks, Chester, Montgomery, Delaware, Camden, Burlington, Gloucester and Salem). The Combined Campaign Advisory Committee (Advisory Committee), which is comprised of those funds and federations that participate in the Campaign and provide direction to the Campaign, seeks proposals from interested and qualified organizations to serve as the Campaign Management Organization. This Request For Proposals (RFP) does not commit the Advisory Committee to award a contract.

Section A. Role and Responsibilities of the Campaign Management Organization

The magnitude of coordinating a diverse campaign dictates the need for a single point of management. The Advisory Committee will select an organization qualified to manage all aspects of the City's Combined Campaign under the guidance of the Advisory Committee and the City of Philadelphia (City), which includes the City's appointed Advisory Committee Chairperson and Campaign Chairperson.

1. Operational Responsibilities. The Campaign Management Organization (CMO) is responsible for planning and managing the operations of the annual Campaign. Specific responsibilities include recommending pledge goals; developing and recommending the Campaign budget; preparing Campaign materials for distribution to City employees, including pledge forms both paper and online; creating public announcements, including web based communication, and coordinating media relationships in the promotion of the Campaign; and organizing presentations by participating funds or federations in conjunction with City departmental coordinators. In addition, the CMO is responsible for training Campaign volunteers; providing appropriate recognition to Campaign contributors and volunteers; providing clerical and other administrative support for the Campaign; and evaluating Campaign operations in order to recommend appropriate improvements for succeeding years.
2. Fiscal Responsibilities. In addition to recommending the annual Campaign budget, the CMO will be responsible for managing all Campaign finances. Related activities include handling Campaign receipt collection, accounting, and distribution; allocating undesignated contributions; preparing periodic and final fund statements; adhering to other financial requirements as determined by government entities; and providing access for and support to an independent auditor.
3. Communication Responsibilities. The CMO is responsible for ensuring sufficient communication among the CMO, the Advisory Committee, and the Campaign Chairperson to ensure appropriate management of the Campaign, including the timely identification and resolution of issues pertaining to Campaign activities as well as to the participation of any applicant or approved fund or federation. The CMO is responsible for developing agenda for Advisory Committee meetings in consultation with the Advisory Committee Chairperson and publishing the Campaign newsletter regularly throughout the Campaign in order to provide City employees with current information on Campaign progress.

4. Limitations. The responsibilities of the CMO are limited to those operational and fiscal activities required for the appropriate conduct of the Campaign. As such, the CMO may recommend changes in Campaign guidelines and City policies to the Advisory Committee Chairperson. The CMO may not approve or implement any deviations from Campaign guidelines and City policies desired by it or any applicant or participating fund or federation without the prior consent of the Advisory Committee and the City. Similarly, the CMO may not interpret Campaign guidelines and City policies for participating funds and federations in a manner that would obviate the letter and spirit of those guidelines and policies. Requests for administrative support for the Campaign from any City entity must be coordinated with the Advisory Committee Chairperson and Campaign Chairperson.

Section B. CMO Qualifications

In order to be selected to manage Campaign operations, an organization must submit a proposal to the Advisory Committee addressing and meeting the following minimum criteria:

1. Understanding of the Combined Campaign and City employees' identity with the Campaign; and
2. Significant fundraising experience, as demonstrated by having managed three fundraising drives within the previous four years, with each drive having 10,000 contributors or \$500,000 in total collections; and
3. Competency, proven track record and demonstrated experience with nonprofit human service organizations. Caliber of staffing (e.g., staff prior experience, education, licenses, professional achievements, etc.) and staff numbers exclusively dedicated to City Campaign; and
4. Internal or contractual capacity for the required data-processing, web-based Campaign portal, publicity, accounting, and audit-related functions, which must be performed under the direction of permanent employees of the CMO; and
5. Ability to establish cost control measures for the Campaign management; and
6. Financial stability, as demonstrated by, but not limited to, its last three annual, audited financial statements; and
7. Capacity to obtain required fidelity bonding; and
8. Recognition by the Delaware Valley metropolitan community as a bona fide fundraising management organization; and
9. Shared commitment, with City, to achieving the objectives of Executive Order 03-12 which strives for the inclusion of Minority, Woman and Disabled Businesses in all business opportunities offered through the City; and
10. Creative plan of action/strategy/solution proposed for Campaign and flexibility of approach; and
11. Business integrity and reputation in the non-profit community. Proposer is required to disclose any past, pending or contemplated civil or criminal penalties imposed on its organization; and
12. Ability to meet time deadlines and adhere to Campaign schedule; and
13. Ability to perform independently (i.e., not requiring significant oversight and management by the City and Advisory Committee); and

14. Willingness to submit to City and Advisory Committee oversight and management; and

15. Base and strength of business within Philadelphia; and

16. Expressed willingness to comply with City of Philadelphia standards for contracting (e.g., indemnification, nondiscrimination, rules of ethics etc.).

In addition, an organization seeking to become the CMO for the City's Combined Campaign must certify in its application that it is in compliance with the City's nondiscrimination policy (Section C) and that it will apply that policy to any outside contractor that it employs for Campaign services.

Section C. City of Philadelphia Nondiscrimination Policy

An organization seeking to become the Campaign Management Organization must have a policy of nondiscrimination adopted by its board of directors in writing which demonstrates a practice of nondiscrimination. Such policy must prohibit discrimination in employment and in the provision of services on the basis of race, color, sex, sexual orientation, gender identity, religion, national origin, ancestry, age, or disability.¹ The policy must be available for review upon request of the chairperson of the Combined Campaign Advisory Committee.

¹ These are categories delineated in the City's Fair Practices Ordinance, Protections Against Unlawful Discrimination , Section 9-1100 of The Philadelphia Code.

Section D. Proposal Requirements

Proposals must contain all required information and supporting documentation regarding the respondent's ability to meet the minimum criteria listed in Section B. It is the responsibility of the respondent to ensure that the information presented is clear and concise.

Proposals must contain a description of the services being offered and the proposed cost of providing those services. The proposal must contain sufficient information to allow the Advisory Committee to determine that the respondent has the ability to ensure that the administrative costs of conducting the Campaign will be reasonable and at the lowest appropriate level. Respondents should use the attached budget format in detailing their proposed costs, including the attached format detailing personnel costs. The proposal must also include the proposed schedule of payment for shared costs by the funds and federations participating in the Campaign.

Respondents must disclose in the proposal, any judicial or administrative proceeding material to its business or financial capability or to the subject matter of this RFP, or that could interfere with respondent's performance of the work requested by this RFP, including, but not limited to, any civil, criminal or bankruptcy litigation; any debarment or suspension proceeding; any criminal conviction or indictment; and any order or agreement with or issued by a court or local, state or federal agency. For each such proceeding, state the name of the case or proceeding, the parties involved, the nature of the claims involved, its current status and the final disposition, if any. Provide the same information for any officer, director, principal, or partner of respondent's organization, and for any subcontractor respondent plans to use to perform the services described in this RFP.

Proposals must contain a proposed schedule for Campaign milestones that will allow the Campaign to begin in the Fall of 2013. Recognition events may occur subsequent to the termination of solicitations.

Proposals must be typewritten with all pages numbered consecutively; the proposal must be signed by the individual duly authorized to bind the organization to the terms and conditions of a written agreement for campaign management with the individual funds and federations on the Advisory Committee.

Section E. Proposal Submission

Twenty (20) copies of the proposal must be submitted by **July 15, 2013** to:

Kevin Vaughan, Advisory Committee Chairperson
City of Philadelphia Employees' Combined Campaign
Health Department Room 600
Municipal Services Building
1401 JFK Boulevard
Philadelphia, PA 19102

Questions pertaining to proposal requirements may be directed to Kevin Vaughan at 215-686-2129 before the deadline for proposal submission.

Section F. Selection of Campaign Management Organization

The Advisory Committee reserves the right, in its sole discretion, to waive any failure to comply with the terms of this RFP if it determines it is in the best interest of the Committee to do so. It is anticipated that the Campaign Management Organization will be selected by the Campaign Advisory Committee no later than **August 7, 2013**. Notwithstanding selection by the Advisory Committee, the City of Philadelphia reserves its right of final approval of the selection; in the event the City does not approve the Advisory Committee's selection, Respondents to this RFP will be so notified.

Section G. CMO Agreement

The selected CMO will enter into an agreement, as drafted by the City's Law Department, with the funds and federations participating in the Campaign; the City is not a party to the agreement. The agreement will include provisions relating to the City's Antidiscrimination Policy discussed in Section H. below.

Section H. Antidiscrimination Policy

Executive Order 03-12 establishes a City policy which seeks to ensure that all businesses, including those businesses owned by minority and disabled persons and women, have equal access to contracting opportunities. In recognition of this policy, the City's Office of Economic Opportunity (OEO) has recommended ranges for the participation of minority-owned business enterprises (MBEs), woman-owned business enterprises (WBEs) and disabled owned business enterprises (DSBEs) for this RFP. These participation ranges expressed below, relate to the total dollar amount of the CMO's contract(s) with MBEs, WBEs and DSBEs in connection with the provision of services related to the CMO Agreement:

MBE 15 - 20 %

WBE 10 - 15% and/or DSBE 10 - 15%

Proposers must include in their proposal a response to the ranges established for this RFP. This response may include identification of MBEs, WBEs and DSBEs that will participate in the agreement or a brief narrative explaining why proposer could not include MBEs, WBEs and DSBEs in its agreement. This information should be submitted with the proposal, although the Advisory Committee reserves the right to request it as well as any additional or clarifying information at any time prior to the execution of the CMO agreement.

**CITY OF PHILADELPHIA
 Employees' Combined Campaign
 Proposed Budget
 August - April**

	Shared Costs	In-Kind Services²	TOTAL
TOTAL SALARIES	\$	\$	\$
BENEFITS			
Employer's Social Security Tax	\$	\$	\$
Medical Insurance	\$	\$	\$
Worker's Compensation	\$	\$	\$
Disability Insurance	\$	\$	\$
Unemployment Compensation Premiums	\$	\$	\$
Retirement Plan	\$	\$	\$
Other (specify if over \$3,000)	\$	\$	\$
TOTAL BENEFITS	\$	\$	\$
 TOTAL COMPENSATION	 \$	 \$	 \$
 OFFICE EXPENSES			
Rent (include square feet and cost per)	\$	\$	\$
Office Supplies	\$	\$	\$
Postage	\$	\$	\$
Telephone	\$	\$	\$
Travel	\$	\$	\$
Other (specify if over \$3,000)	\$	\$	\$
 TOTAL OFFICE EXPENSES	 \$	 \$	 \$
 CONTRACTED SERVICES			
Audit Services	\$	\$	\$
Computer Services	\$	\$	\$
Graphics	\$	\$	\$
Marketing	\$	\$	\$
Other (specify if over \$3,000)	\$	\$	\$
 TOTAL CONTRACTED SERVICES	 \$	 \$	 \$

² Include the estimated fair-market dollar value of donated services, and note the source of the contribution(s).

**CITY OF PHILADELPHIA
Employees' Combined Campaign
Budget**

	Shared Costs	In-Kind Services	TOTAL
PROGRAM/PROMOTIONAL EXPENSES			
Contributor's Guide	\$	\$	\$
Newsletters	\$	\$	\$
Pledge Forms	\$	\$	\$
Posters	\$	\$	\$
Other Printing (specify)	\$	\$	\$
Video	\$	\$	\$
Awards	\$	\$	\$
Buttons	\$	\$	\$
Banner Hanging	\$	\$	\$
Recognition Events	\$	\$	\$
Other (specify if over \$3,000)	\$	\$	\$
TOTAL PROGRAM/PROMOTIONAL EXPENSES	\$	\$	\$
TOTAL PROPOSED BUDGET	\$	\$	\$

**CITY OF PHILADELPHIA
 Employees' Combined Campaign
 Personnel Cost Detail³**

	Annual Salary Equivalent	Salary Charged to Campaign	Hours Per Week September/December	Other
Campaign Professional A			Hours	Hours
Campaign Professional B			Hours	Hours
Campaign Professional C			Hours	Hours
Clerical Support Staff A			Hours	Hours
Clerical Support Staff B			Hours	Hours
Clerical Support Staff C			Hours	Hours
Internal Auditor A			Hours	Hours
Internal Auditor B			Hours	Hours
Intern A			Hours	Hours
Intern B			Hours	Hours
Loaned Executive			Hours	Hours
Other			Hours	Hours
 TOTAL				

³ The positions noted are examples only; respondents must specify those positions that they propose to use in the management of the Campaign.