



Request for Proposals: Production Management

ORGANIZATIONAL INFORMATION:

Name: Chesapeake Bay Foundation, Inc.
Address: 6 Herndon Avenue
Annapolis, MD 21403
Contact: Danielle Green

ISSUE DATE: April 26, 2022

SUMMARY OF NEED:

The Chesapeake Bay Foundation is a non-profit 501(3) (c) environmental organization. CBF seeks a print and production vendor that has superior customer service and flexibility of supporting a direct mail operation, while improving overall cost effectiveness.

THE PROJECT:

CBF's Membership program is an integral part of the organization's development operations and fundraising initiatives. Membership generates revenue and recruits new members primarily through direct mail. A successful direct mail fundraising program is fundamental to accomplishing its mission and is the subject of this Request for Proposal ("RFP").

The Chesapeake Bay Foundation intends to award an open quantity contract for print and production management to the most qualified vendor on an as-needed basis and at CBF's sole discretion over the course of the open term, in a manner consistent with the terms of the Scope of Work.

SCOPE OF WORK:

The level of support and services to be provided by the Contractor will be defined more specifically by individual task orders authorized by the Director of Membership and the below listed activities and responsibilities.

Direct Mail Programs: for purposes of this RFP, the direct mail program currently includes new member acquisition mailings, appeals of varying types, and brochures and other materials including but not limited to those listed below.

- 1) Acquisitions: The New Member Acquisition program is the main channel that drives new members to CBF. The target audience is acquired through list rentals or exchanges. CBF uses a finder file for all new member acquisitions.

- a) There are currently seven (7) acquisition mailings per year equaling approximately 250,000 – 400,000 pieces per drop. Tasks include:
 - i) Manage printing and production for all components of the package, which generally includes: # 6" x 4" window carrier, 2-page letter with reply, 3.5" x 10" coupons, state regulations/member benefits insert, and BRE – sample attached.
 - ii) Secure and manage mailshop vendor.
- b) Appeals: The Appeals program is designed to continue member loyalty through "second" gifts beyond the membership dues. There are currently 12 appeal mailings per year equaling approximately 60,000 per drop. Tasks include:
 - i) Print all components of the package, which generally includes #10 window carrier, 2 page letter with perforated reply, BRE and often times a four color insert-sample attached.
 - ii) Secure and manage mailshop vendor.
 - iii) In addition to the budgeted mailings, there are occasional emergency or additional mailings that arise due to current events or unique fundraising opportunities.
- c) In addition to the projects detailed above, there may be other ad hoc projects throughout the contract period that CBF may or may not use Contractor to produce, including but not limited to: CBF Membership brochures, printing of materials for monthly renewal series, printing of materials for weekly acknowledgement mailings, Wallet Flap BREs, etc.

2) Required Tasking and Responsibilities:

- a) Strategic Planning. Contractor will be expected to work with CBF and its partner agencies on the strategic and budgetary planning for direct mail campaigns. Contractor will be required to provide an overall estimated cost per mailing to ensure that CBF stays within budget constraints.
- b) Project Coordination with Client. Contractor shall work with the CBF Director of Membership, the Associate Director of Membership, and other CBF staff and agency consultants as required.
- c) Research Activity. Contractor will be responsible to stay abreast of industry trends to be sure CBF is aware of any new packaging and/or mailing techniques as related to the direct response fundraising program. Contractor will also be responsible for researching and providing cost-saving alternatives to maintain CBF's fundraising budget. Contractor will need to stay abreast of "green" printing options and suggest new paper/techniques as appropriate.
- d) Data Management. Contractor will need to have extensive knowledge of data and data processing. For all mailings and projects, Contractor will be required to manage the data processing working with CBF and its third party contractors.

Additionally, Contractor will be expected to work with CBF and the data processing vendor to problem solve and offer solutions to any potential data issues.

- e) Postage Regulations. Contractor will also be expected to be current with all postal regulations and inform CBF of any changes that will impact the direct response program.
- f) Production Consultation. Contractor shall be available to consult on an as-needed basis with CBF for mailings they may not be managing and to offer guidance and suggestions for cost-savings and efficiencies.
- g) Maintain appropriate security measures to protect, safeguard and keep confidential information regarding CBF's existing or prospective members/donors, and its name, logo and other proprietary symbols.

3) Deliverables, in writing when applicable (including, but not limited to):

a) Financial: Contractor shall account for funds expended, at minimum providing:

i) Monthly postage requests

- (1) Requests should be line itemed by individual project and specify mailing class, cost per piece and total cost by mailing
- (2) Opening and maintaining an escrow account for postage funds
- (3) Monthly postage account statements
- (4) Postage reconciliation reports for each mailing
- (5) Consolidate and send postal receipts for each panel/package mailed.

ii) The following accountings of each program effort:

- (1) Invoice for each program effort.
- (2) Detail of each component and the required CBF program codes.
- (3) Monthly invoicing summary and aging reports.
- (4) Complete itemizations of printing, postage, and administrative costs.
- (5) Budgets: Contractor shall provide project budgets inclusive of roll-out pricing on test packages

iii) Project Services and Deliverables:

- (1) Consolidate and send CBF individually labeled package samples for each panel of each mailing/project within two weeks of mail date.

- (2) Provide CBF print, personalization, and production approvals for each component and package mailed.
- (3) Provide inventory reports on a monthly basis for all components still in stock.

EXTERNAL PARTNERS AND CONTRACTOR INTERACTION:

CBF holds separate contracts with a team of consultants and service providers. Contractor will be expected to successfully work in partnership with these consultants, who include: a direct marketing agency, list broker, mailhouse, data vendor, and online marketing consultant. Contractor shall be required to interact with appropriate vendors as a representative of CBF in order to create, plan, and implement CBF programs.

EVALUATION CRITERIA:

Vendors will be evaluated on the basis of the written proposals and, if requested by CBF, oral presentations. Vendor's selections will be based on the following criteria:

- Quality and completeness of submitted proposal and presentation.
- Overall direct mail operation capabilities to meet CBF's business needs.
- Superior customer service and account management.
- Experience and qualifications of the company.
- Competitive pricing.
- References and relevant project history.

THE SCHEDULE:

We request that your proposal be delivered electronically to CBF staff member Danielle Green (dgreen@cbf.org) no later than 5:00pm on May 18, 2022. Any hardcopy samples can be mailed to:

Danielle Green
Director of Membership
Chesapeake Bay Foundation
6 Herndon Ave.
Annapolis, MD 21403

It is the intent of CBF to make a selection no later than June 1, 2022. We will notify you once a decision for award of bid is made.

The schedule requires that the selected entity provide services from July 1, 2022 through June 30, 2025. Services thereafter are open to annual renewal for a period of two years commencing July 1 through June 30 in conjunction with CBF's fiscal year.

MINIMUM REQUIREMENTS:

At a minimum, you must:

- Complete response form (attached).

- Comply with applicable federal, state or local charitable solicitation laws and regulations applicable to persons engaged in professional fundraising.
- Have five or more years of experience managing direct mail production, preferably for other environmental non-profits.

INTERVIEWS:

Interviews are not anticipated but may be scheduled after review of all proposals.

MINORITY PARTICIPATION:

CBF actively encourages proposals from Small, Women and Minority Owned (SWAM) Businesses. Please note if you are a Small, Women or Minority Owned Business and if you are certified by the State/Commonwealth/DC.

FOR FURTHER INFORMATION OR QUESTIONS:

Danielle Green
Director of Membership
Chesapeake Bay Foundation
6 Herndon Ave.
Annapolis, MD 21403
443-482-2120
dgreen@cbf.org

BID RESPONSE FORM:

Please complete the following information for your response:

- 1) The name and full contact information of your company and, if applicable, any other entity comprising your team.
- 2) Provide a sample schedule for a typical campaign – time needed from initial strategy to post-mailing analysis.
- 3) List and describe a project completed within the previous three years that is comparable to the work you would do for CBF. Include management of mailhouse services.
- 4) List three client references and their contact information for whom you or your team members have completed work similar to that described in this RFP.
- 5) Provide two (2) samples of acquisition or appeal packages you have worked on for other clients.
- 6) Pricing: Please provide a complete print quote for each of the following. Samples of each are attached. Please itemize charges if applicable:
 - a) Acquisition – quantity of 1,000,000 (roll out quantity)
 - b) Appeal – quantity of 60,000
 - c) Magazine BRE, quantity of 60,000
- 7) Sample client documents, such as end of campaign reports and invoices.

A successful applicant may need to provide proof of insurance based on the services or product provided.

The undersigned certifies that the information submitted above is true and accurate. The undersigned certifies that the person, firm, association, co-partnership or corporation herein named, has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in the preparation and submission of a proposal to the Chesapeake Bay Foundation for consideration in the award of a contract.

The undersigned further certifies that the firm, association, or corporation or any person in a controlling capacity associated therewith or any position involving the administration of federal funds; is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency; has not been suspended, debarred voluntarily excluded, or determined ineligible by any federal agency within the past three years; does not have a proposed debarment pending; and has not been indicted, convicted, or had a civil judgment rendered against said person, firm, association, or corporation by a court of competent jurisdiction on any manner involving fraud or official misconduct within the last three years.

I further acknowledge that by signing this page of the proposal, I am deemed to have agreed to the provisions of the affidavit.

(Name of Firm)

(Authorized Signature) (Title)

(Please print Name)

(Date)