



Request for Proposals: List Management and List Brokerage

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 direct mail list manager and broker specializing in the non-profit, regional, environmental market.

THE PROJECT:

CBF is in need of an industry expert that can both manage and broker lists in support of its mailed acquisition program. A regional mailer, CBF requires guidance on list strategy for 7-9 mailings per year. In depth market analysis is required and the chosen vendor must make thoughtful recommendations about specific lists to test and which selections to employ.

CBF also exchanges its list with like-minded non-profits, and the chosen vendor must proactively manage CBF's list in a way that remains true to its mission while maximizing cost savings and revenue potential.

SCOPE OF WORK:

- Provide list strategy for 7-9 new member acquisition mailings per year.
- Promote rental of CBF's membership list through solicitations, personal sales calls, advertising, and seminars directed at list brokers, direct marketers, advertising agencies and public relations agencies involved in direct mail advertising. Make CBF's list available for rental to all recognized mailing list brokers and direct mail advertisers, unless expressly restricted by CBF.
- Obtain and supply to CBF upon request a sample of all materials proposed for distribution by prospective users of CBF's list.
- Manage list invoicing, bookkeeping, collection and remittance of the net proceeds of each list rental.
- Provide monthly reports detailing: list activity, billing, rental revenue, amount due for each transaction and an aged accounting summary.
- Follow-up and collect on all accounts receivable generated through CBF list rentals.

- Maintain a calendar tracking clearance requests and orders placed for CBF's list.
- Coordinate with CBF to establish list usage limitations.
- Maintain and provide upon request a Certificate of Insurance.
- 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.

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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.

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 have the following qualifications.

- Comply with applicable federal, state or local charitable solicitation laws and regulations applicable to persons engaged in professional fundraising, list brokerage, and list management.
- Five or more years of experience managing and promoting lists in the regional, environmental non-profit market.
- Provide three references.

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: [Attach resumes of individuals involved.]
2. List and describe three projects completed within the previous five years that are relevant to this project. If the relevance is not immediately obvious, please describe briefly the relationship as you see it: [Attach additional information as appropriate.]
3. 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:
4. Include basic information and history about the business entity, financial information, technical capability, and any other information you feel is important for us to know.
5. Fee Proposal, detailed to the greatest extent possible – cost for service: hourly rates (if applicable), typical direct out of pocket costs such as travel reimbursement, copies, mailings etc..., and any other anticipated expenses that you foresee: (change this description if it is for equipment, software, or supplies)
6. Additional information, such as you/your team member's particular experiences, training, and/or academic background(s) that may make you uniquely qualified for this position. [Attach additional materials as appropriate.]

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)