



## Marketing Services: Request for Proposal

# Marketing Services Request for Proposal November 2018



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### 1. Introduction and Executive Summary

PhillySEEDS, Inc. is a 5-year old non-profit affiliate of the Philadelphia Housing Authority that is seeking to raise its profile in the community through effective and dedicated marketing and fundraising strategies and services, to include a social media presence for appropriately targeted and curated audiences. Those audiences and strategies for development need to be determined.

PhillySEEDS seeks to raise funds, especially in the areas of housing and education opportunities, to provide life-changing opportunities for PHA residents in ways that the housing authority cannot, including in the areas of its 3 core programs of scholarships, homeownership assistance, and assistance with security deposits for PHA residents. It also has other community initiatives and seeks to develop more partnerships (Annual Report attached).

This Request for Proposal (“RFP”) seeks offers for such services from suppliers.

### 2. Request for Proposal Timeline and Protocol

#### 2.1 *Acknowledgment of RFP Receipt*

Within 48 hours of your receipt of this RFP via email to: [info@phillyseeds.org](mailto:info@phillyseeds.org) to confirm receipt.

#### 2.2 *RFP Questions, Inquiries, and Clarifications*

All written questions and inquiries will be answered in writing. In order to speed the RFP process, PhillySEEDS requests that all questions regarding the RFP be submitted by **Friday, November 9, 2018** in writing. Responses will be shared with all companies involved in the RFP in order to ensure the communication of PhillySEEDS’ needs is as clear as possible.

#### 2.3 *Submittal Guidelines*

Please provide an electronic document response to the RFP in either Word Document or PDF to [info@phillyseeds.org](mailto:info@phillyseeds.org). Hard copies are not required, but if you wish to submit one, please send to the following address:

PhillySEEDS, Inc.  
1800 S 32<sup>nd</sup> Street, 2<sup>nd</sup> Floor  
Philadelphia, PA 19145

#### 2.4 *Disclaimers*

Please be aware that PhillySEEDS is not committed to any course of action as a result of its issuance of this Request for Proposal and/or its receipt of a proposal from you or other firms in response to it.

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### 3. Company Overview

#### 3.1 History

PhillySEEDS is a 501(c)(3) not-for-profit organization affiliated with the Philadelphia Housing Authority (PHA), which provides opportunities to educate, empower and build self-sufficiency in residents living in public and assisted housing. PhillySEEDS' mission complements the overall mission of PHA and to advance educational, economic, and social services opportunities for residents and families of public and assisted housing through philanthropic activities, community-based partnerships, and special initiatives.

#### 3.2 Mission

To provide self-sufficiency, education, and empowerment opportunities to residents living in public and assisted housing through programs, philanthropic fund raising, community-based partnerships and special initiatives.

#### 3.3 Vision

**PhillySEEDS has 4 Vision points:**

- Improve the quality of life and economic well-being of residents of public and assisted housing
- Promote the transformation and revitalization of distressed neighborhoods
- Expand affordable homeownership opportunities
- Encourage and support higher education opportunities for youth & adult residents

#### 3.4 Strategic Plan

##### **PhillySEEDS' Strategic Plan**

Since the creation of PhillySEEDS in 2013, the organization has focused addressing the two strategic priorities of PHA highlighted above, and has developed three core programs: Annual Scholar Program, Homeownership Closing Costs Assistance Program, and Affordable Rental Security Deposit Assistance Fund. Funding from the PNC Foundation, matched by the Federal Assets for Independence Grant Program, will support PhillySEEDS Homeownership Closing Costs Assistance program

The goals, accomplishments, and targets for these programs are outlined below.

#### **1. Annual Scholar Program**

##### **Goal:**

This Program supports PHA residents that are entering or continuing education at a college, university or trade school with scholarships. A secondary goal is to encourage positive role modeling of the pursuit of higher education within the community.

##### **Accomplishments to Date**

Since 2013, \$1,090,000 in scholarships have been awarded to 273 residents. This program has been funded from private donations, fundraising and PHA vendors fulfilling Section 3 commitments.

##### **2018 Target:**

During the 2018 Calendar Year, PhillySEEDS will project to fulfill a Scholarship dollar commitment of \$265,000 which will be funded by private donations, fundraising and PHA vendors fulfilling Section 3 commitments.



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### 2019 Target:

During the 2018 Calendar Year, PhillySEEDS will project to fulfill a Scholarship dollar commitment of \$270,000 which will be funded by private donations, fundraising and PHA vendors fulfilling Section 3 commitments.

## 2. Homeownership Closing Costs Assistance

### Goal:

The Program assists residents interested in buying their first home by providing a dollar for dollar match of a resident's savings for the purchase of a home, up to \$2,000.

### Accomplishments to Date

Since 2014 PhillySEEDS has assisted 49 resident homebuyers with more than \$102,690 in down payments and closing costs. This program has been funded from PHA contribution, private donors and fundraising.

### 2018 Target:

During the 2018 Calendar Year, PhillySEEDS will project to fulfill its Homeownership Closing Costs Assistance commitment of \$75,000 which will be funded by PHA contribution, private donors, foundation grants and fundraising.

### 2019 Target:

During the 2018 Calendar Year, PhillySEEDS will project to fulfill its Homeownership Closing Costs Assistance commitment of \$100,000 which will be funded by PHA contribution, private donors, foundation grants and fundraising.

## 3. Affordable Rental Security Deposit Assistance Fund

### Goal:

Many Housing Choice Voucher residents are low to moderate income, and need assistance in meeting security deposit requirements. The Program provides a dollar for dollar match of a resident's security deposit savings, up to \$2,000.

### Accomplishments to Date

Since 2014, PhillySEEDS has assisted 40 residents with residents with more than \$41,504 in security deposit assistance. This program has been funded from PHA contribution, private donors and fundraising.

### 2018 Target:

During the 2018 Calendar Year, PhillySEEDS will project to fulfill its Affordable Rental Security Deposit Assistance commitment of \$35,000 which will be funded by PHA contribution, foundation grants, private donors and fundraising

### 2019 Target:



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During the 2018 Calendar Year, PhillySEEDS will project to fulfill its Affordable Rental Security Deposit Assistance commitment of \$40,000 which will be funded by PHA contribution, foundation grants, private donors and fundraising



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### 4. Request for Proposal Instructions

#### 4.1 Definitions

Organizations receiving this RFP shall hereinafter be referred to as: “Bidders”, “Suppliers” or “Vendors”.

#### 4.2 Selection & Implementation Process

Potential Suppliers will be evaluated on their responses in accordance with PhillySEEDS’ pre-determined selection criteria. Responses shall be graded numerically for selection purposes and weighted accordingly to meet the specific needs of the organization.

Upon review of the responses, additional questions may be required of both parties. Additional negotiations may occur to secure the best competitive value for PhillySEEDS and its participants. PhillySEEDS may elect to forego this phase if it becomes apparent that a firm has proposed a sound approach and aggressive pricing which exceeds that of its competition.

#### 4.3 RFP Questions, Inquiries and Clarifications

Every attempt will be made to answer all inquiries from each bidder in a complete and concise manner. To ensure consistent interpretation of the RFP, the written answers will be made available to all suppliers including participant making the inquiry.

Each supplier has a duty to inquire about and clarify any RFP issues that the supplier does not fully understand or believes may be interpreted in more than one way. PhillySEEDS shall have no obligation to correct, nor bear any responsibility for errors (whether by commission or omission), ambiguity, or inconsistency in this RFP. If any bidder is aware of or believes that the RFP contains such an error, it is the supplier’s responsibility to promptly notify PhillySEEDS in writing.

By submitting a proposal, the supplier represents that they have read and clearly understand this Request for Information and they are capable of providing the required services on the agreed implementation date. The contents of any submitted proposal will be considered an offer to contract by the bidder.

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### 4.4 Response Preparation and Format

All responses to this RFP should be complete and concise. Suppliers must submit their proposal in strict accordance with all requirements of the RFP. Deviations, clarifications and/or exemptions must be clearly identified and listed separately as alternative items for consideration. The foregoing notwithstanding, you are encouraged to offer various options to meet our goals and objectives.

### **YOUR RESPONSE MUST BE RECEIVED NO LATER THAN Friday, October 19, 2018 by 5:00 pm EST**

Suppliers may also be asked to give formal presentations and should be prepared to discuss all aspects of the proposals during this process.

### 4.5 Supplemental Information

Unless supplemental oral commentary is specifically requested, oral communications outside the scope of the procedures detailed in this RFP will not be considered in connection with your proposal.

### 4.6 Non-Disclosure

This RFP contains information that is Proprietary to PhillySEEDS and its subsidiaries. No part of this RFP may be reproduced, in whole or in part, unless specifically required for the bidder's internal use in responding to this RFP. Disclosure or distribution without the express written consent of <<Company>> and its subsidiaries is strictly prohibited.

The bidder will regard and preserve as confidential all information obtained from any source as a result of this RFP. It is for proposal purposes only and is not to be disclosed or used for any other purpose. PhillySEEDS reserves the right to request the return or the destruction of any of the material contained in this RFP document.

Information received in response to this RFP will be held in strict confidence and not disclosed to any party other than PhillySEEDS without the express written consent of said bidder.

### 4.7 Right to Change/Modify Response

This RFP is not an offer to contract, but represents a definition of our requirements. Your preparation and submission of a response does not commit PhillySEEDS or its subsidiaries to award the business to any bidder even if all of our requirements are met. PhillySEEDS and its subsidiaries reserve the right to amend, supplement, withdraw or otherwise modify our requirements in whole or in part and seek additional bidders to submit bids. We also reserve the right to accept or reject any or all responses to the RFP and to enter into discussions and/or negotiations with more than one qualified bidder at the same time should the action be in the best interest of PhillySEEDS and its subsidiaries. In no event will PhillySEEDS or its subsidiaries be responsible for any costs associated with the preparation of your proposal. All responses to this RFP will become the property of PhillySEEDS and its subsidiaries.

### 4.8 Terms of Responding

Responding to this RFP constitutes acceptance by bidder of all terms and conditions printed in this document, unless otherwise noted. All respondents to this RFP must agree to the terms and conditions listed with an understanding that they will be incorporated into an agreement.

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### 4.9 Effective Term of Response

Following the date of submission of the proposal, and prior to contract award, the terms and conditions of the offers shall be binding upon the bidder for a period of one hundred and eighty (180) days.

PhillySEEDS reserves the right, in its sole discretion, to contract with a single bidder or multiple bidders based on the overall impact of the bidders' proposals or on any other evaluation criterion. Only the execution of a definite, binding agreement(s) will obligate PhillySEEDS in accordance with the terms and conditions contained in such agreement(s).

### 4.10 Not an Offer to do Business

The issuance of this RFP does not imply that PhillySEEDS is making an offer to conduct, expand, or terminate business with any RFP participant. PhillySEEDS reserves the right to accept a complete response, or portion thereof, or to accept none of the responses. Your preparation and submission of a response does not commit PhillySEEDS to award the business to any bidder even if all the requirements are met.

### 4.11 Reliance on PhillySEEDS' Comments

For the purposes of this RFP, no bidder may consider any oral representations or statements by an officer, employee, or agent of PhillySEEDS to be an official expression on PhillySEEDS' behalf, unless such representations or statements are made in a written communication from PhillySEEDS executed by a duly authorized representative of PhillySEEDS. All statements from PhillySEEDS regarding any substantive matter associated with this RFP will be in writing and copies thereof will be forward to all bidders under consideration.

### 4.12 Supersede Agreement

By submitting a proposal in response to this RFP, Bidder hereby agrees to offer PhillySEEDS the option to terminate, without penalty, all or a portion of any existing agreements between Bidder and PhillySEEDS for the services specified herein. The option to terminate may be exercised immediately, only in the event that PhillySEEDS selects the incumbent service provider as the winning bidder.

### 4.13 Binding Proposal Acknowledgment

A duly authorized officer of the bidder must sign each proposal and the completed proposal shall be without inter-lineation, alterations, or erasures. It will be assumed that all representations made in your proposal will be binding and that your organization has agreed to all the requirements of the RFP unless specifically stated otherwise.

### 4.14 Review Rights

Proposals submitted might be reviewed and evaluated by any person(s) at the discretion of <<Company>>, including employees or contract workers within PhillySEEDS and any third party or independent consultants retained by PhillySEEDS now or in the future.

We reserve the right to accept or reject any or all responses to this RFP and to enter into discussion and/or negotiations with one or more qualified bidders at the same time, if such action is in the best interest of PhillySEEDS.

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### 4.15 Unsuccessful Proposals

Non-acceptance of any proposal does not imply any criticism of the proposal and/or any implication that the proposal was deficient. Non-acceptance of any proposal will mean only that another was deemed to be more advantageous to PhillySEEDS has rejected all proposals. PhillySEEDS is not obligated to accept the proposal offering the lowest cost of services.

Upon award and execution of a binding agreement, the bidder's contacts for the unsuccessful bidders will be notified.

### 4.16 Copyright

No part of this publication may be reproduced, reformatted, or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording or through any information storage and retrieval system currently available or developed in the future, without prior written approval of PhillySEEDS. Copyright law and international treaties protect this document.

### 4.17 Performance Guarantees

PhillySEEDS expects the chosen firm to provide performance guarantees with associated fees/premiums at risk. You should demonstrate your commitment in the Technical Questions portion of this RFP.

### 4.18 Advertising

PhillySEEDS and its subsidiaries will seek to agree with the Supplier the terms under which the PhillySEEDS' name or any of its trademarks or service marks can be used in advertisements or those of any of its subsidiaries. Any use outside of such an agreement is strictly forbidden.

The Supplier will be responsible for obtaining any and all licenses and permits and for complying, on a voluntary basis, with all applicable local, state and federal laws, codes and regulations in performance of services at premises of PhillySEEDS and its subsidiaries.

### 4.19 Independent Contractor

Nothing contained in this RFP shall be construed to constitute the bidder as a partner, employee or agent of PhillySEEDS or its subsidiaries, nor shall either party have the authority to bind the other in any respect, it being intended that each shall remain responsible for its own actions. The Supplier is retained only for the purposes and to the extent set forth in this Agreement, and Supplier's relationship to PhillySEEDS and its subsidiaries shall be that of an independent contractor. Neither the Supplier nor the Supplier's employees assigned to perform services shall be deemed to be employees of PhillySEEDS or its subsidiaries. The Supplier shall be solely responsible for the payment of compensation to the Supplier's employees assigned to perform services hereunder. The Supplier shall be solely responsible for the payment of employee benefits, if any, workers' compensation, disability benefits and unemployment insurance, and for withholding and remitting any local, state or federal payroll-related taxes.

### 4.20 Conflict of Interest

The bidder shall disclose any actual or apparent conflict of interest that may exist between the bidder, any employee or owner, or any party that the bidder contemplates may provide services or materials to PhillySEEDS or its subsidiaries if the bidder is selected and any party having an interest in PhillySEEDS or its subsidiaries.

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### 4.21 Proposed Timetable

The following is the proposed timetable developed for this project. You will be notified of any significant changes that may occur:

EVENT	DATE
Distribute Request for Proposal	Friday, November 2, 2018
RFP Response Due	10 Business days from responses provided
<<Company>> to complete review	30 days from receipt or later



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### 5. Business Size and Ownership Certification <<if applicable>>

PhillySEEDS is committed to enhancing business opportunities for small, minority, and women-owned business enterprises (SBE,M/WBE) as 1st and 2nd Tier Suppliers. Should your company qualify for any of the designations, please ensure that you also submit a signed copy of the Business Size & Ownership Certification form when you submit your bids.

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### 6. Operational Capabilities

#### A. General Company Information

1. How long has your company been in business?
  2. What is your mission statement?
  3. Has your company changed ownership in the last 3 years? If so, please describe the changes in ownership.
  4. Advise of any significant mergers, acquisitions, or projected changes in ownership of your company within the next 12 months.
  5. Please describe your major divisions and each of your primary products by division.
  6. Please describe any strategic partnerships that you currently have with other companies/clients.
  7. Is your company currently under investigation?
  8. Provide three (3) client references. Include: name of company, name of primary contact, responsibility, phone number, and e-mail address.
  9. Provide a one page summary describing your company's traits, attributes, capabilities and why you are interested in participating in this program.
  10. Describe how your company's capabilities are distinguishable from your competitors in your industry.
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### 7. Work Flow and Management

*Provide an outline of your work flow, marketing and fundraising programs/campaigns executed, volume, any future plans to consider, internal support team/execution team, challenges, etc. for the following categories:*

- 1) develop a marketing strategy for the next year to maximize our outreach, engagement, and visibility (to include email communications and donor opportunities)
- 2) manage our social media platforms, such as Facebook, Twitter, Youtube, etc., to create content and involvement
- 3) identify and present the successes of scholarship awardees on social media platforms
- 4) monitor, manage and respond to social media conversations and communications
- 5) identify new fundraising initiatives and ways to create and leverage partnership, sponsorship, donor, and foundation relationships

### 8. Pricing/Cost

1. Please detail your pricing structure.
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