



MEALS ON WHEELS FOUNDATION OF
NORTHERN ILLINOIS



Request for Proposal
Direct Mail & Digital Services
February 22, 2019

Introduction and Executive Summary

Meals on Wheels Foundation of Northern Illinois (MOWF) is looking for a direct response marketing firm that can best meet our needs with competitive pricing. We are currently seeking a firm that can provide solutions for some or all of the area of needs listed below to drive unrestricted revenue. A firm may bid on digital services only, mail services only or both.

Overall Direct Marketing Strategy: file growth, revenue growth, retention, increased ROI, annual to monthly donor conversion, testing plans, budgeting, analytics

Direct Mail: Acquisition, appeals, cultivations, and events

Email Marketing: Welcome series, appeals, cultivations, e-newsletters, emergency alerts, retention communications, events, emergency donor conversions

Digital fundraising and engagement: Website donor conversion strategies, lead generation, social media integration, AdWords management and testing, SEO, multi-channel campaigns

Other: Mobile Fundraising and Engagement, Peer-to-Peer and Crowdfunding, Multimedia

A. Request for Proposal Timeline and Protocol

Open Tender Published	February 22, 2019
RFP Questions Due	February 28, 2019
MOWF Response to Questions	March 5, 2019
RFP Response Due	March 22, 2019
MOWF to Complete Shortlisted Vendor Selection	March 29, 2019
Projected Award Date	April 5, 2019

Proposals must be provided no later than 5:00 pm on March 22, 2019. Proposals received after the stated deadline are considered invalid, but exceptions may be made on a case-by-case basis. Proposals should be sent in PDF format to afunk@twbfundraising.com. No phone calls, please.

B. Request for Proposal – Source Selection Criteria

Submissions will be weighted according to the following:

- Pricing 25%
- General Experience (Company Credential, Client, Account Team, etc.) 25%
- Technical Expertise 40%
- Client Reference 10%

C. Company Overview

The Meals on Wheels Foundation of Northern Illinois is a not-for-profit organization created to increase public awareness and generate contributions to support the services provided by Community Nutrition Network and Senior Services Association (CNNSSA). The Meals on Wheels Foundation (MOWF) was created in 2001 as the fundraising, community outreach, and public awareness arm of Community Nutrition Network & Senior Services Association.

The Foundation seeks support for the funding of Community Cafes and home delivery of meals to eligible older adults in Cook, Grundy, and Kendall counties in Illinois. In order to create new revenue support for CNNSSA's expansion into the collar counties, additional subsidiaries of the Meals on Wheels Foundation of Northern Illinois were created. The CNNSSA staff in each of these counties work to raise resources for the programs in that particular county. Funds raised in these counties for the nutrition programs remain in those counties to support the local needs of older adults living there.

In 2005, Community Nutrition Network & Senior Services Association began serving seniors in Grundy and Kendall Counties as well as in suburban Cook County. Community Nutrition Network & Senior Services Association is now one of the largest senior meal providers in the nation.

Throughout these three counties, where service is provided, there are nine Community Cafes and nine sites that serve as meal distribution hubs for the Home-Delivery program. Community Nutrition Network & Senior Services Association has expanded the Home-Delivery program so some older adults receive meals seven days a week as needed. Each older adult who receives Home-Delivered meals also receives at least three shelf stable meals at the beginning of each winter in case inclement weather prevents a volunteer from making it to their door.

To learn more about us, visit <https://mowfni.org/>

D. Current Direct Marketing Program

The current direct response program includes mail acquisition and house appeals, email marketing appeals, cultivations, emergency alerts and e-newsletters. We would like to add digital marketing via lead generation, paid and organic search strategies and web site-specific campaigns to encourage conversion. We would also like to expand workplace giving, text-to-give and peer-to-peer campaigns.

Meals on Wheels Foundation of Northern Illinois operates on an October 1 – September 30 budget year with a cost budget of approximately \$250,000.

MOWF RFP – Direct Mail & Digital

In this budget year, we executed:

- January (week of 7th) –Direct Mail Renewal (annual)
- January 25th – Bi Monthly ENewsletter & Top of the Year Appeal
- January (week of 28th) – Direct Mail Planned Giving
- February 8th – Volunteer Opportunities (volunteers only)
- February (week of 11th) – Annual Event Save the Date to Donors
- February 15th – Impact Statement (mailed, possibly some emailed...your gift of XX, provided XX meals)
- February (week of 18th) – Direct Mail Renewal (critical needs)
- March 1st - Volunteer Opportunities (volunteers only)
- March 15th – Bi Monthly ENewsletter
- March 25th – Direct Mail March/Spring Acquisition
- April 1st - Volunteer Opportunities (volunteers only)
- April - \$1,000+ club Appreciation Event Save The Date
- April – Anniversary Mailing (individuals who haven't given again since 1st gift last year April, see attached image for idea)
- April (week of 15th) – Direct Mail Renewal (senior malnutrition)
- May 1st - Volunteer Opportunities (volunteers only)
- May 6th – Direct Mail Planned Giving
- May 15th – Bi Monthly ENewsletter
- June 1st - Volunteer Opportunities (volunteers only)
- June (week of 3rd) – Direct Mail Renewal (summer meals)
- July 1st - Volunteer Opportunities (volunteers only)
- July – Annual Event
- July 15th – Bi Monthly ENewsletter
- August 1st - Volunteer Opportunities (volunteers only)
- August (week of 12th) - Direct Mail Cultivation
- September 1st - Volunteer Opportunities (volunteers only)
- September (week of 2nd) – Direct Mail Renewal (emergency meals)
- September – Appreciation EVENT (Breakfast meet and greet, host at J2 gallery, include impact testimonials from CEO, volunteer and client w/ brief slideshow a la Healthy Communities event we attended)
- September 15th – Bi Monthly ENewsletter
- October – Impact Report (mailed and emailed)

Other:

- Facebook/Instagram
- SEO/Google Ad Words

E. Challenge and Vision

Meals on Wheels Foundation of Northern Illinois has a strong brand and a high direct mail conversion rate. We seek a direct response partner who can help us take advantage of opportunities when they arise. We seek to be a leader in implementing proven digital strategies and in testing new online marketing strategies, and are looking for a partner with demonstrated success in this area. As our donor base grows, we want to speak to our audiences where they are, with tailored messaging that is personalized for them.

The long-term goals for the direct response program are to grow a healthy donor file that provides a consistent pool of unrestricted funding, and to a lesser extent, restricted funding. Because we rely heavily on direct mail, Meals on Wheels Foundation of Northern Illinois has struggled to grow its major donor base. A healthy file will drive new, unrestricted revenue and will include a robust monthly giving group, strong mid-level donor and upgrade programs, strong retention efforts and will provide a pipeline to the major gift program. In broader terms, this program should support the efforts of the MOWF team to increase awareness and understanding of the Meals on Wheels Foundation of Northern Illinois brand and persuade supporters to make an investment in our organization, in addition to a direct mail gift.

Our challenge is to achieve our ambitious goals within an established not-to-exceed ceiling of this procurement as \$250,000/fiscal year. Our current gross revenue target is \$950,000, but would grow as we grow the donor file.

F. System

Below is software we use for direct marketing:

- CRM: Raiser’s Edge (system of record)
- Donation Page and Mass Email: DonorBox/Stripe, Constant Contact & SendinBlue
- CMS: Joomla
- Text: Would need to be established

G. Donor File Summary

Our direct marketing house file can be broken into 3 different categories:

- Current Donors – These donors were acquired through many channels (online, events, direct mail) as unrestricted donors. Lapsed Donors – Donors who have donated unrestricted gifts and were acquired through many channels (online, events, direct mail), but haven’t activated to the file in 24+ months.
- Warm prospects- on-line donors or event attendees.
- Current donor file size is 16,000 database records.
- Total file size is 43,000 database records.

H. Scope of Work

The firm we engage will provide some or all of the following services:

- Overall Direct Marketing Strategy: file growth, revenue growth, retention, increased ROI, testing plans, budgeting, analytics
- Direct Mail: Acquisition, appeals, acknowledgements, and cultivations
- Email Marketing: Welcome series, appeals, cultivations, e-newsletters, emergency alerts, retention communications, annual to monthly donor conversions
- Digital fundraising and engagement: Website donor conversion strategies, lead generation, social media integration, AdWords management and testing, SEO, multi-channel campaigns
- Other: Mobile Fundraising and Engagement, Peer-to-Peer and Crowdfunding
- Multimedia, telemarketing, inbound marketing

Scope of Work in Bid – Digital

ELECTRONIC DONOR COMMUNICATIONS

Bi-monthly Emails (appeals, cultivations, events, etc.)

- Present 2 template concepts to choose from
- Copywriting for up to 6 emails
- Layout/design implementation for up to 6 emails
- HTML development for all 6 emails
- QC/deliverability testing

Welcome/Thank You emails

- Present 2 template concepts to choose from
- Copywriting for each message
- Layout/design for each message
- HTML development/email
- QC/deliverability testing

Emergency alerts, retention communications, emergency donor conversions

- Present 2 template concepts to choose from
- Copywriting for each message
- Layout/design for each message
- HTML development/email
- QC/deliverability testing

MOWF RFP – Direct Mail & Digital

Bi-Monthly e-newsletter

- Present 2 template concepts to choose from
- Copywriting for 6 e-newsletters
- Layout/design implementation for 6 e-newsletters
- HTML development for 6 e-newsletters
- QC/deliverability testing

SOCIAL MEDIA INTEGRATION

Regional Facebook Posts (up to 8x a month)

- Copywriting and images

Facebook ad campaign 4x/year (includes Giving Tuesday, volunteer recruitment)

- Copywriting and images

Instagram Posts (up to 8x a month)

- Copywriting and images

Monthly social media reports

SEO, KEYWORDS, ADWORDS

- SEO audit and keyword research
- Writing optimized SEO copy
- Crosslink/backlink analysis and optimization
- AdWords management and development

Guidelines for Work in Bid – Direct Mail

MONTHLY MAILINGS

Company Name:						
Monthly 6x9 Closed Face	37,500	45,000	12,500	15,000	17,500	Comments / Notes
Description	Preprint Inventory	Preprint Inventory	Print/Mail or Mail Only	Print/Mail or Mail Only	Print/Mail or Mail Only	
6x9 Closed Face Outer	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	6x9, No Window, Print 2/1 Jet (no bleed), 24# WW
#9 BRE	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	#9, Print 1/0 (no bleed) plus internal tint, 20# or 24# WW
3-1/2x8-1/2 Response	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	3-1/2x8-1/2, Print 3/1 on 80# white offset, may bleed, may provide 3 up
8-1/2x11 Letter	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	8-1/2x11, Print 4CP/1Blk on 60# offset, one fold to 5-1/2x8-1/2
Match Mailing			\$0.00	\$0.00	\$0.00	CASS, Sort, InkJet OE, InkJet or Laser Response, Match OE to Response, Insert three, Mail NP Indicia
Total Preprint and Mail	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Provide general Data Reports, will want FINAL return files, Data signoffs
Total Print/Mail ea Mo			\$0.00	\$0.00	\$0.00	Mail Tracking, Drop Undeliverables, Trim RD if 3 up
Additional:						
-NCOA (if applicable)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	NCOA Processing \$/M or Minimum

-In all print components include PDF then one hi res and one low res proof except BRE which is PDF only
 -Freight to destination included, Chicago suburbs likely. Include mail delivery to local USPS
 -If versions come intop play costs will be added accordingly

ACQUISITION MAILINGS

Company Name:			
Acquisition 6x9 Window	100,000	350,000	Comments / Notes
Description	Print/Mail	Print/Mail	
6x9 Window Outer	\$0.00	\$0.00	6x9, Window 1-1/4x4, position tbd, Print 2/1 Jet (no bleed), 24# WW
#9 BRE	\$0.00	\$0.00	#9, Print 1/0 (no bleed) plus internal tint, 20# or 24# WW
3-1/2x8-1/2 Response	\$0.00	\$0.00	3-1/2x8-1/2, Print 3/1 on 80# white offset, may bleed, may provide 3 up
8-1/2x11 Letter	\$0.00	\$0.00	8-1/2x11, Print 4CP/1Blk on 60# offset, one fold to 5-1/2x8-1/2
Mailing	\$0.00	\$0.00	CASS, Sort, InkJet or Laser Response, Insert three, Mail NP Indicia
Total Print/Mail	\$0.00	\$0.00	Provide general Data Reports, will want FINAL return files, Data signoffs
			Mail Tracking, Drop Undeliverables, Trim RD if 3 up
Additional:			
-NCOA (if applicable)	\$0.00	\$0.00	NCOA Processing \$/M or Minimum

-In all print components include PDF then one hi res and one low res proof except BRE which is PDF only
 -Freight to destination included, Chicago suburbs likely. Include mail delivery to local USPS
 -If versions come intop play costs will be added accordingly

I. Outline of Proposals

Proposals should be sent in PDF format via email to afunk@twbfundraising.com. Proposals should include, but are not limited to, explaining in detail the vendor's proposed processes for working with MOWF's team to:

- Formulate marketing and channel strategies
- Develop and execute fundraising plans on time and on budget
- Design and execute creative
- Develop and manage yearly schedules of activities
- Assess process and programs
- Report results and refine strategies based on data a minimum of monthly

We have described our current program in detail. In your proposal, please outline your recommendations for the Meals on Wheels Foundation of Northern Illinois' direct response program and describe, overall, how a partnership with you will help us overcome our challenges and meet our goals.

J. Proposal Narrative - Please address the following in your proposal:

General Company Info

- Please provide the name and contact information for your company.
- Primary point of contact
- Office location(s)
- Size by staff
- Current client list (to identify potential conflicts with your assignment)
- Examples of past/current clients for whom you have done similar work
- How many years has your company been in business?

Administration

- Describe Data Security, Transfer and Storage, and Privacy systems
- Describe List Management
- Describe invoicing process
- Do you provide pass-through payment for printing and production costs?
- Do you mark-up pass through costs?
- Are you registered to solicit in US?
- Are you registered to solicit anywhere else?
- Are you able to support our time zone - CST
- Describe what an agency/client relationship would look like. What is a typical team?
- Bios of key personnel

Strategy and Budgeting

- Explain your process for creating a typical budget and direct response strategy for your clients.
- Do you have experience with sustainer conversion?
- What are key indicators you use to determine the health of a direct mail campaign?
- What is your expertise in mail campaigns?

Marketing Campaigns – Digital

Email

- Describe the typical strategic planning process for email campaigns
- What is your creative capacity for email?
- What is your development capacity for email coding?
- What is your plan to maintain good deliverability?
- What experience do you have with marketing automation?

Digital Marketing Strategy

- Describe your experience with Google Tools – analytics, AdWord, Google Grants
- Explain how you would use the organizational website as a tool for fundraising and lead generation
- Explain how you would use other digital platforms as a tool for fundraising and lead generation
- Describe a healthy digital marketing program.

Data and Reporting

- Describe your reporting capabilities. What reports would you deliver and how often?
- How do you work with us to use stats to drive smart decisions? What's your expectation of our participation?
- Please briefly describe your LTV methodology.
- How do you measure the ROI of online investments? Please briefly describe related tracking mechanism you would need to implement.
- Can you provide benchmarking information?
- Please describe data points you would need during onboarding
- Describe your experience and/or capabilities in peer-to-peer fundraising, workplace giving, mobile giving and any other giving channels.

K. Budget

This proposal must include a budget for all aspects of the work, including those that will be performed by subcontractors, and the firm must accept accountability and final responsibility for the quality and timeliness of everything done by the subcontractors. The not-to-exceed ceiling for subject procurement is established as \$250,000 in expense/fiscal year including retainers. (If you are submitting a bid for digital services only, not-to-exceed ceiling is established as \$50,000/fiscal year including retainers.) Any submissions that propose yearly expenses above this amount will not be considered. A firm may bid on digital services only, mail services only or both. Budget bid should be something that is sustainable in the near future. (2-3 years minimum)

Costs to include:

- Retainer – Itemize everything that is included or explain your cost structure if not retainer-based
 - separate your costs by mail (offline) and online services.
- Any costs not included in retainer
- Provide a sample annual direct marketing plan and budget for Meals on Wheels Foundation of Northern Illinois, outlining typical or average creative, production, development and printing costs

Samples and Attachments:

- Please provide an example of a campaign report
- Please provide an example of an in-depth analysis, and how it drives decision making.
- Provide 2 samples of email campaigns and results
- Provide one acquisition mail appeal
- Provide one house mail appeal
- Provide one case study of a digital campaign including creative and results
- Provide 3 client references

L. Request for Proposal - Terms and Conditions:

Issuance of this RFP does not constitute an award commitment on the part of the Meals on Wheels Foundation of Northern Illinois, nor does it commit Meals on Wheels Foundation of Northern Illinois to pay for costs incurred in the preparation and submission of a bid.

Attached files are integral part of this RFP. By submitting the valid offer to this RFP you accept to adhere to RFP and Terms and Conditions. Meals on Wheels Foundation of Northern Illinois may contact bidders to confirm contact person, address, bid amount and to confirm that the bid was submitted for this solicitation.

False Statements in the Bid:

Bidders must provide full, accurate and complete information as required by this solicitation and its attachments. False statements in bids constitutes grounds for immediate termination of the agreement with vendor. Meals on Wheels Foundation of Northern Illinois takes fraud, misstatements, falsification, manipulation, alteration of facts and/or documents very seriously and has a zero-tolerance policy and may choose to take legal action in case of misrepresented disclosures by Contractors.

Conflict of Interest Disclosure:

Bidders must provide disclosure of any past, present or future relationships with any parties associated with the issuance, review or management of this solicitation and anticipated award. Failure to provide full and open disclosure may result in Meals on Wheels Foundation of Northern Illinois having to re-evaluate the selection of a potential Bidder.

M. Right to Select/Reject

Meals on Wheels Foundation of Northern Illinois reserves the right to select and negotiate with those firms it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. Meals on Wheels Foundation of Northern Illinois also reserves the right to reject any or all proposals received without explanation.

Reserved Rights:

All RFP responses become the property of Meals on Wheels Foundation of Northern Illinois and MOWF reserves the right in its sole discretion to:

- To disqualify any offer based on Bidder’s failure to follow solicitation instructions; waive any deviations by Bidder from the requirements of this solicitation that in MOWF’s opinion are considered not to be material defects requiring rejection or disqualification; or where such a waiver will promote increased competition;
- Extend the time for submission of all RFP responses after notification to all Bidders;
- Terminate or modify the RFP process at any time and re-issue the RFP to whomever MOWF deems appropriate;
- Issue an award based on the initial evaluation of offers without discussion;
- Award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.

Code of Conduct

Meals on Wheels Foundation of Northern Illinois is committed to upholding the highest standards in all our business dealings with the U.S. Government and other international and private funders, protecting taxpayer resources, and providing high-quality services and products. Complying with all laws and regulations and ensuring fair competition are fundamental to this commitment.

Contact Information for RFP Submission & Questions:

Amy Funk, Senior Vice President, Ter Molen Watkins & Brandt

afunk@twbfundraising.com

2 N. Riverside Pl.
Suite 1875
Chicago, IL 60606

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