



**United Way  
of the National Capital Area**

UNITED WAY OF THE NATIONAL CAPITAL AREA  
REQUEST FOR PROPOSALS FOR DIRECT MAIL  
AGENCY

September 2020

United Way of the National Capital Area  
1101 15<sup>th</sup> Street NW  
Washington DC 20005

## **Introduction**

United Way of the National Capital Area (United Way NCA) is soliciting bids from full-service agencies to serve as our contracted vendor for the current fiscal year (July 1, 2020 to June 30, 2021) and beyond capable of providing direct mail services highlighted below. United Way NCA is pleased to invite your agency to participate in the process by submitting a proposal.

This material should be considered completely confidential. The contents of the material should not be discussed with anyone outside of your organization. Questions regarding confidentiality should be referred to United Way NCA. Similarly, your response to this RFP will remain confidential. If you wish to decline the invitation to submit a proposal, please return this material with your response.

## **United Way NCA Background**

For almost 50 years, United Way NCA has worked diligently to change the lives of people and families in the Washington Metropolitan Area. Five years ago, United Way NCA set out to tackle complex, interconnected issues like poor health, school graduation, and poverty. Our goals for our Community Commitment were:

- To help children and adults in our community thrive through an integrated approach to health and wellness that not only fights childhood obesity but also creates good habits for life.
- To prepare 12,000 low-income middle school students to transition to high school. To perform at grade level. And stay on track to succeed.
- To help 100,000 area residents achieve financial stability. And, remove barriers to stable and affordable housing.

In the time since we launched our Community Commitment, we have seen solid outputs.

- Served 14,547 low-income middle school students transition to high school and perform at grade level through our 13 Title I community schools across the region surpassing our goal of 12,000.
- Nearly 88,047 area residents have received free financial and tax services, helping elevate their financial circumstances so they have a real chance to be firmly rooted in the middle class.
- Put nearly \$80.6M back in the pockets of working families' tax refunds by offering no-cost tax preparation and access to the Earned Income Tax Credit.
- Over the last five years through Project Homeless Connect, United Way NCA has convened over 1,800 volunteers, over 230 providers to bring over 2,030 of our neighbors that are at-risk of or experiencing homelessness the much-needed resources like employment information, access to vital records, housing information, dental and medical services.
- Provided 4.26 million meals to food-insecure students and families.
- And helped save residents nearly \$21.8M in prescription cost through our FamilyWize program.

While our Community Commitment results are impressive, the disparities are real, and the need continues in the National Capital Area – the United Way NCA seeks to partner with a new direct mail vendor to:

- Assess United Way NCA’s current direct mail program
- Lead us through the end-to-end decision-making process
- Leverage United Way NCA’s direct mail program to increase donor retention and ROI based on best practices
- Guide us to a decision that is in the best long-term financial stability of the organization.

## **The Landscape**

United Way NCA is at a pivotal point in its history – with globalization and ever-changing communities – the philanthropic landscape has shifted, and it is time to undergo transformational change to maintain relevance, engage donors and drive revenue. We are no longer your “grandfather’s” United Way, but rather a collective impact organization.

Prior to the COVID-19 outbreak, the organization was poised to launch its 5-year strategic programmatic direction focused on increasing equity by reducing disparities in our community. The needs for innovative and comprehensive solutions are even more critical as we are finding the gaps of inequity widening for individuals that fall below poverty guidelines, who lack adequate access to healthcare, are in communities of color or have different abilities. Those that once took comfort in their low to medium socio-economic status are now in the thresholds of these inequities as household incomes are significantly reduced.

Strengthening our current direct mail efforts, leveraging strong and compelling storytelling and our competitive advantage to drive awareness of who we are and what we do while creating and sustaining a movement that showcases the impact in the communities we serve, is critical to United Way NCA’s success.

## **United Way NCA Mission and What We Do**

**United Way improves lives of underserved individuals in the national capital area by focusing community resources on creating measurable and lasting impact.**

### **WHAT EXACTLY DO WE DO**

United Way of the National Capital Area mobilizes all sectors of the community to work together with one goal in mind – helping children and families live their best lives by reducing disparities and increasing equity.

We address the needs of our community by focusing on three key pillars of impact – **health, education, and economic opportunity.**

### **WHY DO WE DO WHAT WE DO**

We are **uniquely positioned** at the intersection of the public, private, philanthropic, and nonprofit sectors to bring the best resources, individuals, and organizations together to solve our region’s most pressing issues facing our community today.

### **HOW DO WE DO WHAT WE DO – BY MOBILIZING OUR COMMUNITY MOBILIZING DONORS & VOLUNTEERS**

It takes just a single person to initiate change. United Way NCA connects individuals – donors and volunteers with causes close to their hearts and inspires them to roll up their sleeves by giving of their time and treasure to support our community. Our goal is to ensure that national

capital residents feel that everyone is needed, appreciated and see themselves included as part of the solution.

### **MOBILIZING ORGANIZATIONS**

Because our community's challenges are bigger than one organization can solve alone – United Way NCA convenes and collaborates with organizations across sectors to tackle our community's most critical problems.

We use data to identify the needs in our community. We design evidence-based programs that address the needs. We convene best-in-class programmatic partners who align with our three pillars. We build capacity for over 400 nonprofit partners. We measure outcomes to drive impact.

### **MOBILIZING COMPANIES**

Local businesses are the economic engine for our community. United Way NCA helps them leverage their people and resources to connect to causes that are important to them and make an impact in the community where they live and work.

United Way NCA must transform corporate relationships by not only offering the traditional workplace campaigns but expanding to a year-around model of engagement that includes a corporate social responsibility consultancy approach. Attracting and retaining a highly engaged workforce means connecting with employees at a deeper level on the issues and causes that matter to them and to a business. Changes in the marketplace, generational trends, and an ever-changing landscape create new opportunity for corporations to align social impact and employee engagement with business objectives. United Way NCA is strategically positioned to help corporate partners build out what they do and make even greater impact in our region.

### **Project Scope**

We desire the chosen mail house to explore a variety of direct mail services including but not limited to:

- Consulting on best direct mail practices based on market standards (letter length, typeface, envelope sizes/taglines/colors, etc.)
- Bulk pricing for several mail pieces and/or multi-year contract options
- Data quality control, segmentation, and National Change of Address reports that are machine readable, include our identifier(s) as provided in original data, and easily uploaded into United Way NCA's database (Andar).
- Performance evaluation for each mail piece (returns, ROI, etc.)
- Condensed postage and production invoice process
- Streamlined process with minimal back-and-forth with United Way NCA staff through the duration of each project

More specifically, United Way NCA desires to retain the services of an organization with expertise in direct mail best practices with the ability to evaluate our current initiatives, offer solutions to improve each type of mail piece to include increasing response rates and engagement, and ways to streamline the process - all the while staying on budget and saving costs whenever possible.

To carry our mission forward and tackle the competitive market– we must become a nimble, donor-centric organization, deliver on our strategic vision, develop and sustain strong programs that are outcomes driven, move with a sense of urgency and incorporate fundraising into the fabric of our culture. We must meet and engage donors where they are, forge lasting relationships and create opportunities for individuals to get involved, support critical programs, and take action to make an impact in our community. Over the last three years, we have developed an effective direct mail processes, but we recognize the need to re-evaluate and improve them in order to stay relevant in the regions’ current nonprofit landscape.

## **Current Situation**

The efforts listed below are entirely manual and staff-driven.

- 3 solicitation letters
  - November, March, and May (with a potential to add back the September appeal)
  - Range of 5-9 pages
  - Single-sided on standard 8.5”x11” paper with 1-2 pages in color
  - Data merges on the first and last pages
  - Reply page on 8.5”x11” grey paper printed in color with data merges
  - #9 return envelope with live stamp
  - Packaged in a variety of carriers including #10, 9”x12”, and 6”x9” with a printed teaser quote and live stamps
  - Approximately 12K total pieces over the fiscal year
- 4 quarterly stewardship memorandums
  - September, December, March, May
  - Range of 2-5 pages
  - Double-sided on standard 8.5”x11” paper in color
  - Data merges on the first and last pages
  - Cover letter on Monarch paper printed in black and white with data merges
  - Packaged in a #10 carrier
  - Approximately 12K total pieces over the fiscal year
- Monthly workplace acknowledgement letters
  - Single-sided on standard 8.5”x11” paper
  - Approximately 10K total pieces over the fiscal year

## **Desired Situation**

From FY19 to FY20, our direct mail appeals proved that the content in each letter has strengthened and that donor capacity to increase giving is present.

The chosen mail house will work with United Way NCA’s current workload, as well as advise on adding additional mailers including but not limited to:

- Planned giving postcards, letters, brochures, and/or buck slips
- Affinity society updates and reports

That is precisely why it is critical to choose the best direct mail expert who can partner with us to accurately assess our current efforts and help us develop a more standardized, automated, and robust direct mail program.

## **Process**

- Accept invitation submit basic capabilities (Tuesday, September 22)
- Zoom conversation and meet and greet (Thursday, October 1)
- Submit formal proposal (Thursday, October 8)

## **RFP Response Content**

In general, your response to this RFP should (i) try to persuade us that your company truly understands the purpose and scope of this RFP and is the ideal choice to provide the requisite services outlined in this RFP; and (ii) include pricing, deadlines, details on any subcontractor involvement, etc. More specifically, your RFP response should include the following information:

- Describe your knowledge of United Way NCA, community engagement and potential interest in establishing a philanthropic partnership with United Way NCA
- If applicable, outline any other engagement initiatives with local United Ways throughout the country
- Describe your philanthropic activities in the National Capital Area
- Provide a summary of your organization's understanding of the proposal
- Provide your organization's background information
- Demonstrate your organization's commitment to diversity and inclusion
- Outline your organization's response to the novel Coronavirus (COVID-19) and how your services may have been impacted
- Describe your organization's competitive advantage in the market
- Explain how your organization will meet or exceed each of the requirements outlined in the RFP
- Provide a detailed variable price quote and fixed price quote, including the "per unit" pricing for each cost component (i.e., number of hours and hourly rate per position) and all underlying assumptions
- State whether you discount your for-profit pricing for 501(c)(3) non-profit clients and quantify the non-profit discount factored into your proposal
- Detail any potential discounts for a multi-year contract
- Describe the size and composition of your proposed project team, including a current bio of each project team member and direct contacts for this proposal
- Provide a list of current and former client references, including minority and women-owned clients
- Explain your organization's financial health and ability to operate for the duration of this project
- This RFP is confidential and should only be shared with people who have a need to know

## **RFP Response Format**

Your formal written response should follow the order of the questions listed above. Please use Microsoft Word with 12-point Arial style font and 1.15 line sentence spacing and 6 point paragraph spacing.

**Submission and Questions:** All proposals must be delivered electronically. Final proposals must be received by 5 PM on October 8, 2020 to be considered. Proposals may be submitted electronically to [philanthropy@uwnca.org](mailto:philanthropy@uwnca.org). We will announce award by October 14, 2020.