



**EASTERN MASSACHUSETTS
&
RHODE ISLAND & SOUTHEASTERN
MASSACHUSETTS**

COMBINED FEDERAL CAMPAIGNS

**REQUEST FOR PROPOSAL
FOR
Principal Combined Fund Organization
For The 2016-17 Campaign**

OFFERS DUE BY **January 22, 2016**

**By email to:
Mary.Doherty@dot.gov**

Tel: (617) 494-2669

**GBFEB Web Site: <http://www.boston.feb.gov>
Eastern MA CFC Web Site: <http://www.easternmasscfc.org>
RI/Southeastern MA CFC Web Site: <http://www.riandsemacfc.org/>
OPM Web Site: www.opm.gov/cfc**



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**Eastern Massachusetts and
Rhode Island and Southeastern Massachusetts
Local Federal Coordinating Committees (LFCC)
Statement of Work (SOW) for the
Principal Combined Fund Organization (PCFO)
For the 2016-2017 Campaign**

PART I

1. PURPOSE

The Greater Boston Federal Executive Board (GBFEB) Local Federal Coordinating Committee (LFCC) and the Rhode Island and Southeastern Massachusetts LFCC are soliciting applications from federated groups, charitable organizations or a combination thereof interested in being considered to serve as the Principal Combined Fund Organization (PCFO) for:

- The 2016-2017 Eastern Massachusetts Combined Federal Campaign (CFC) (Contract Line Item (CLIN) 0100), and
- The 2016-2017 Rhode Island and Southeastern Massachusetts CFC (CLIN 0200), or
- Both CFC's (CLIN 0300).

The purpose of the SOW is to outline the regulatory requirements, performance expectations and deliverables required for an organization to function as the PCFO and to operate the Eastern MA CFC and RI and Southeastern MA CFC or both.

1.1 CAMPAIGN PERIOD

A campaign period begins with the selection of the PCFO(s) and ends with the final disbursements to charitable organizations participating in the local campaigns (approximately 24 months).

1.2 BASE AND OPTIONAL CLINS

ITEM	DESCRIPTION	QTY	UNIT	AMOUNT
0100	Services per the Statement of Work, Section 5, for Eastern MA	1	JOB	\$_____

0200	Services per the Statement of Work, Section 5, for RI and Southeastern MA	1	JOB	\$ _____
0300	Optional Services per the Statement of Work, Section 5, for Eastern MA and RI and Southern MA	1	JOB	\$ _____

Applicants are strongly encouraged to submit offers for each or all CLINS presenting alternative approaches for satisfying the requirements of this solicitation. Each offer submitted will be evaluated separately.

The Government will evaluate offers for award purposes as follows:

- For offers submitted for CLIN 0100 only, the total price for the basic requirement.
- For offers submitted for CLIN 0200 only, the total price for the basic requirement.
- For all offers submitted for CLIN 0300, the total price for the combined requirements.

The Government may determine that an offer is unacceptable if the prices are significantly unbalanced. Evaluation of the options shall not obligate the Government to exercise the option(s).

2. MISSION

The mission of the CFC is to support and to promote philanthropy through a program that is employee-focused, cost-efficient and effective in providing all Federal employees the opportunity to improve the quality of life for all. Federal employees created the CFC -- one campaign, once a year. By allowing employees to select the organizations of their choice from a single brochure and to make their contributions through payroll deductions, the CFC opened wide the door to more opportunities for generous giving to literally thousands of worthy causes. The CFC is the only authorized solicitation of employees in the Federal workplace on behalf of charitable organizations.

CLIN 0100: The CFC of Eastern MA was formed in 2004, the result of a merger of 3 CFC areas encompassing MA Bay, Merrimack Valley, and Central MA CFC. Annually, it solicits approximately 46,000 employees with duty stations in Eastern MA from the postal, military, and civilian branches.

CLIN 0200: The CFC of RI and Southeastern MA was formed in 2008. Annually, it solicits approximately 20,000 employees with duty stations in RI and Southeastern MA from the postal, military, and civilian branches.

Optional CLIN 0300: If combined, the CFC's of Eastern MA, and RI and Southeastern MA will

solicit approximately 66,000 employees.

The CFC currently is made up of over 250 local campaigns and raised approximately \$193 million nationally from over 2 million postal, military and civilian employees in 2014. The CFC is transitioning to 40 nationwide “zones” beginning with the 2017-2018 campaign. The CFC’s of Eastern MA and RI and Southeastern MA will be included as part of one Northeastern zone once transitioned, and the LFCC’s are interested in combining PCFO responsibilities in the forthcoming 2016-2017 campaign if determined to be most economical and efficient.

The Office of Personnel Management’s (OPM) Office of CFC Operations has the overall responsibility for the setting of policy and overseeing the structure of the CFC. It reviews and provides guidance and technical advice on regulations and has the authority to conduct compliance audits on any CFC local campaign fiscal records. Each campaign is directed by a LFCC comprised of members of local Federal interagency organizations that acts as a “Board of Directors” for the local campaign.

3. CFC AUTHORITY

Title 5, Code of Federal Regulations, Part 950.104 authorizes the LFCC to solicit applications from federations, charitable organizations, or combinations thereof to serve as the PCFO, and to select a PCFO to act as its fiscal agent and campaign coordinator for the CFC.

Title 5, Code of Federal Regulations, Part 950.105 outlines the responsibilities of the PCFO. In addition, § 950.601 provides additional requirements governing the release of contributor names.

4. PRINCIPAL COMBINED FUND ORGANIZATION (PCFO) RESPONSIBILITIES

The primary responsibility of the PCFO is to support the federal government in managing a comprehensive local workplace fundraising campaign while ensuring the fiscal integrity, accountability, and transparency of the process. A primary goal of the PCFO is to conduct an effective and efficient campaign in a fair and even-handed manner.

Title 5, Code of Federal Regulations, Part 950.105(d) outlines the responsibilities of the PCFO, which are summarized below, but are not limited to the following: (a copy of the CFC regulation may be obtained at www.opm.gov/cfc).

- a. Honors employee designations.
- b. Works with agency campaign officials to ensure no employee is coerced in any way regarding participation in the campaign. Informs the LFCC(s) of any allegations of coercion that are brought to the attention of the PCFO.

- c. Provides training for Loaned Executives/Account Managers, coordinators and key workers in accordance with section 950.105(d) (3) of the regulation.
- d. Ensures that no employee is questioned in any way as to his or her designation or its amount in accordance with section 950.105(d) (4) of the regulation.
- e. Prepares the annual pledge card and brochure consistent with the regulations and OPM instructions. Submits all campaign materials to the LFCC(s) for approval.
- f. Honors employee requests that their name not be released to organization(s) that they designate in accordance with section 950.105(d) (6) of the regulation.
- g. Maintains a detailed schedule of PCFO actual CFC administrative expenses and receipts in accordance with section 950.105(d) (7) of the regulation.
- h. Keeps and maintains CFC financial records and interest-bearing bank account separate from the PCFO's internal organizational financial records and bank accounts. Interest earned on all CFC accounts must be distributed in the same manner as undesignated funds pursuant to Section 950.501. Additionally, interest earned on these bank accounts must be reported on the OPM Form 1417 and reported separately to the LFCC(s) with a copy of the OPM Form 1417. All financial records and bank accounts must be kept in accordance with generally accepted accounting principles.
- i. Submit to the LFCC(s) an audit of collections and disbursements for each campaign managed in which the last disbursement is made. The audit must be performed by an independent certified public accountant in accordance with generally accepted auditing standards and OPM guidance.
- j. Absorbs the cost of any reprinting of campaign materials due to the PCFO's noncompliance with these regulations, embezzlement, or loss of funds. The PCFO must also absorb campaign costs exceeding 10 percent of the approved budget.
- k. Designs and implements CFC award programs which are accessible to all employees, subject to the LFCC's approval, and in accordance with section 950.105(d) (11) of the regulation.
- l. Produces any documents or information requested by the LFCC(s) and/or the Director, CFC Operations, OPM, with 10 calendar days of the receipt of that request.
- m. Responds, in a timely and appropriate manner, to reasonable inquiries from participating organizations.
- n. Submits to the LFCC(s) copies of all correspondence and reports submitted to OPM.

5. STATEMENT OF WORK (SOW)

The purpose of the SOW is to outline the requirements, performance expectations and deliverables required to serve as the PCFO to the local CFC campaign, as outlined in Title 5, Code of Federal Regulations, part 950 and CFC Guidance Memoranda. Complete copies of all CFC regulations and memoranda are available on the following website: www.opm.gov/cfc.

5.1 AGREEMENT TERM

The GBFEB will enter into an LFCC-PCFO Memorandum of Understanding for the 2016-2017 PCFO position consistent with the CFC regulations, or in guidance issued by OPM's Office of CFC Operations, for CLIN 0100.

The RI and Southeastern MA LFCC will enter into an LFCC-PCFO Memorandum of Understanding for the 2016-2017 PCFO position consistent with the CFC regulations, or in guidance issued by OPM's Office of CFC Operations, for CLIN 0200.

The GBFEB reserves the right to join efforts with the RI and Southeastern MA LFCC to enter into a LFCC-PCFO Memorandum of Understanding for the 2016-2017 PCFO position for both campaigns consistent with CFC regulations, or in guidance issued by OPM's Office of CFC Operations, for CLIN 0300.

5.2 TASKS

Tasks descriptions and requirements for are Financial Accountability, Training/Pledge Support, Processing Support, Campaign Management and Administrative Support, Campaign Marketing, Deliverables and Reporting are detailed below.

5.2.1 FINANCIAL ACCOUNTABILITY

The PCFO agrees to maintain a system of records that insures the integrity and accountability of all funds administered in support of the CFC program. To meet this objective the PCFO shall, in accordance with CFC regulations:

- a. Honor employee designations by ensuring that funds are distributed to recipient organizations pursuant to regulatory guidelines and that necessary controls are established to maintain accountability and disclosure.
- b. Distribute undesignated funds to all organizations in the brochure in the same proportion that they received designations.
- c. Maintain a detailed schedule of PCFO actual CFC administrative expenses (with receipts) and actual versus budget reports. Receipts shall be submitted to the LFCC(s) on a bi-monthly basis.

- d. Maintain CFC financial records and interest-bearing bank accounts separate from the PCFO's internal organizational financial records and bank accounts.
- e. Maintain all financial records and bank accounts pursuant to generally accepted accounting principles.
- f. Implement necessary controls to insure that interest earned on all CFC accounts is distributed in the same manner as undesignated funds.
- g. Submit to the LFCC(s) an audit of collections and disbursements no later than June 15 for each campaign managed in which the last disbursement is made in accordance with the CFC Audit Guide found on the OPM web site (www.opm.gov/cfc). The audit must be performed by an independent certified public accountant pursuant to generally accepted auditing standards and OPM guidance.
- h. Absorb the cost of any reprinting of campaign materials due to the PCFO's non-compliance with these regulations, embezzlement, or loss of funds.
- i. The PCFO must also absorb campaign costs exceeding 10 percent of the approved budget unless the Director of CFC Operations at OPM approves any overage.
- j. Maintain a detailed line item budget for each individual campaign cycle that details all estimated and actual costs (including receipts) required to operate the CFC. Note: All campaign expenses/line items exceeding \$1,500.00 must be approved in writing by the LFCC(s) prior to the expenditure by the PCFO.

5.2.2 TRAINING/PLEDGE SUPPORT

The PCFO shall:

- a. Provide orientation for campaign representatives, coordinators and key workers. Key workers should be trained to check to ensure the pledge card is legible on each copy, verify arithmetical calculations, and ensure the block on the pledge card concerning the release of the employee's name and address is completed fully.
- b. Prepare the annual pledge card and brochure consistent with the regulations and OPM instructions. Submits all campaign materials to the LFCC(s) for approval in accordance with predefined schedules established by the LFCC(s).
- c. Work with agency campaign officials to ensure no employee is coerced in any way regarding participation in the campaign or questioned as to his or her designation or its amount.
- d. Maintain donor privacy and honors employee requests that their names not be released to organization(s) that they designate.

- e. Support Government actions to provide electronic pledge processes to employees. Support shall include production of an electronic brochure file in predefined format of the campaign's local listing and, if required, the software/tools to interface with Employee Express, MyPay, NEXUS or other sources to ensure proper, efficient and accurate reporting of electronic pledges. Training on all electronic media will be given to all campaign representatives, coordinators and key workers.

5.2.3 APPLICATIONS PROCESSING SUPPORT

The PCFO shall support the LFCC(s) in processing applications for participation by local charities in the CFC. The PCFO will not determine the eligibility of local organizations that apply to participate in the local campaign. The eligibility determination is the exclusive responsibility of the LFCC(s), and may not be delegated to the PCFO. However, tasks performed by the PCFO in support of this process may include:

- a. Assist in the dissemination of information regarding the solicitation of applications.
- b. Support development of local instructions and forms to assist charitable agencies applying for participation in the CFC.
- c. Assist the LFCC(s) in the screening of applications for completeness.

5.2.4 CAMPAIGN MANAGEMENT AND ADMINISTRATIVE SUPPORT

The PCFO shall provide support to the LFCC(s) in strategic planning and campaign management for all aspects of the campaign including:

- a. Provide logistical ability to host meetings and trainings for CFC loaned and volunteer staff.
- b. Provide adequate internal controls to ensure that pledge information is inputted accurately and completely.
- c. Establish campaign pledge goals and suggest innovative outreach and marketing approaches with particular emphasis on low participation agencies.
- d. Make every effort to ensure that assigned CFC staff and their responsibilities to the campaign are not changed during the solicitation period, and alert the LFCC(s) as soon as possible should a staffing change be necessary.
- e. Identify and solicit Loaned Executive/Account Manager from local federal agencies to assist in the campaign.

- f. Establish a network of employee key workers and volunteers in local federal agencies to carry out the campaign.
- g. Ensure that, to the extent reasonably possible, every employee is given the opportunity to participate in the campaign.
- h. Maintain records of meetings and activities performed in support of the CFC.
- i. Provide a planning calendar that identifies key campaign events and milestones, including but not limited to:
 - 1) Review of campaign strategies based on previous campaign results and the PCFO's assessment of the previous campaign strengths and weaknesses;
 - 2) Major campaign events and PCFO/LFCC meetings;
 - 3) National and regional workshops and conferences;
 - 4) Release of information and reports required by regulation and this performance agreement;
 - 5) Review and update of agency account profiles;
 - 6) LFCC(s) review of donor recognition awards;
 - 7) Planned agency head visits;
 - 8) Interviewing of prospective Loaned Executive/Account Manager;
 - 9) LFCC(s) review of campaign materials (i.e., pledge card, Contributor's Guide, posters, donor recognition awards, reports, invitations, and "thank you" items, etc.);
 - 10) LFCC(s) review of training materials for Loaned Executive/Account Manager, Coordinators and Key workers, Campaign events such as the Kick Off and Chairman's Recognition Event;
 - 11) Publication and distribution schedule for campaign materials to participating federal agencies;
 - 12) Training schedule for Loaned Executive/Account Manager, Coordinators and Key workers;
 - 13) Web site design, development and/or updates. A CFC domain name(s) is owned by the CFC and is transferable upon request;
 - 14) Reporting and allocation of contributions;
 - 15) Collection of agency employment and chair/vice chairpersons and coordinator contact information; and
 - 16) Federal employee education and outreach activities.

5.2.5 CAMPAIGN MARKETING

The PCFO will be responsible for certain campaign marketing activities. These may include but are not limited to:

- b. Provide an analysis of the prior year's campaign results including any noted strengths/weaknesses and opportunities for improvement.

- c. Design and implementation of CFC awards programs, which are accessible to all employees, subject to the LFCC's approval.
- d. Support pledge drive events as defined by the LFCC(s).
- e. Identify and support scheduling of locally, regionally, or nationally recognized individuals to serve as keynote speakers or presenters at special CFC events including, but not limited to, the CFC Kick-Off Event and Recognition Ceremony. The PCFO shall make every effort to obtain these speakers or presenters pro bono. All speakers and presenters are subject to LFCC(s) approval.
- f. Provide federations and agencies the opportunity to offer suggestions related to the operation of the campaign, printed materials, and training.
- g. Design, develop and submit for LFCC(s) approval prior to publication all campaign promotional materials and an annual report. Campaign promotional materials include, but are not limited to letterhead paper and envelopes, posters, invitations to special events, theme and logo contest posters and applications, video, Contributor's Guide, Coordinator/Key Worker Guide, certificates and award plaques, donor recognition awards, campaign forms and reports and annual report in a timely manner. ***[NOTE: Combined campaign promotional materials for both Eastern MA and RI and Southeastern MA CFC's are strongly encouraged for applicants responding to Optional CLIN 0300 and should be considered in pricing the CLIN.]***
- h. Design, develop, and submit for LFCC(s) approval prior publication the CFC training materials for the Loaned Executive/Account Manager and Coordinators/Key Workers. ***[NOTE: Combined training materials for both Eastern MA and RI and Southeastern MA CFC's are strongly encouraged for applicants responding to Optional CLIN 0300 and should be considered in pricing the CLIN.]***
- i. Design, develop, launch and update subject to LFCC(s) approval a web-based CFC site(s) and pages to achieve two principal objectives for the campaign:
 - 1) Enable donor and charities to easily access information and participate in the CFC at a lower cost; and
 - 2) Allow PCFO's and LFCC's to communicate more efficiently with donors, federal agency volunteers and charities.
- j. The web-based CFC site(s) should contain the following minimum content and functions:
 - 1) Front page (welcome) should include the campaign logo and theme, and summary results from the most recent campaign. This page should have buttons (page links) for each of the primary pages available on the site.
 - 2) The primary pages should contain at a minimum:

- a. An events notice page, announcing planned events by type, date, and location. This page should describe how a charitable organization could participate in each event, if appropriate, and it should provide a contact name and telephone number or E-mail address for each event. This page will require updating as needed.
 - b. An LFCC page (to post LFCC notices, advisories and membership).
 - c. Exit survey asking the visitors opinion about the web site.
- 3) Enable employees to search for a list of particular organizations to certain criteria (e.g., CFC designation code, administrative expense range, organization name).

[NOTE: One web-based CFC site for both Eastern MA and RI and Southeastern MA is strongly encouraged for applicants responding to Optional CLIN 0300 and should be considered in pricing the CLIN. The front page of the site shall include most recent information on both campaigns with a primary page for each campaign.]

5.2.6 DELIVERABLES

Regulatory Requirements: FFR§950.102(c), 103(b), 105(e), and 603, govern the PCFO's reporting relationships with LFCC and OPM. The LFCC is authorized to govern the conduct of the CFC and is responsible for overseeing the performance and accountability of the PCFO. However, the OPM Director is the final authority in interpretation of regulations and program policy. A PCFO's failure to comply with program regulations may result in either disqualification from future service as PCFO, disqualification as a participating federation, or both penalties.

- a. Provide to the LFCC(s) all of the deliverables described in 5 CFR 950.105 and 950.401 (a) within the timetables described therein. The LFCC(s) will ensure, with PCFO support, all campaigns submit the compliance assessment documents to OPM by September 15, 2018.
- b. In addition to the regulatory requirements for publication of the annual Contributor's Guide, it will include the following additional information:
 - 1) The name and sponsoring agency of each Loaned Executive/Account Manager,
 - 2) An Alphabetical Index placed in the front pages of the Guide listing the four-digit code, organizational name, and page location for each organization listed in the Guide;
 - 3) A Numerical Index in ascending order inserted after the Description of Organizations that contains the four-digit code, organizational name and page location for each organization listed in the Guide; and
 - 4) A letter(s) provided by the Campaign Chairperson or LFCC(s) to be placed in the front portion of Guide.

[NOTE: One Contributor's Guide for both Eastern MA and RI and Southeastern MA CFC's are strongly encouraged for applicants responding to Optional CLIN 0300 and should be considered in pricing the CLIN.]

- c. In addition to the regulatory requirement under Section 104 (c) to post public notice soliciting applications for the PCFO, the Statement of Work will be announced on the Eastern MA CFC web site (<http://www.easternmasscfc.org>), the Greater Boston Federal Executive Board web site (<http://www.boston.feb.gov>), and the RI and Southeastern CFC web site (<http://www.riandsemacfc.org/>).
- d. Reports, Briefing Materials, Listings, and Labels. (Note all campaign records, including reports, must be retained a minimum of three campaign years. In the event the PCFO changes, all pertinent records must be transferred to the LFCC(s)).
 - 1) Provide to the LFCC(s) management informational reports describing the campaign results including absolute, statistical, and comparative data monthly during the campaign and as needed, thereafter. These reports should provide campaign data for the current year and a minimum of three previous years. Management information reports should include, but are not limited to “agency/employee report by structure,” “agency history,” “agency giving levels,” and “recipient organizations” and agency head contact information.
Provide to the LFCC(s) a complete set of management information reports for the 2016-2017 campaign within three months after the completion of the annual campaign or no later than March 15, 2018.

Monthly reports during the campaign shall include at a minimum the following data:

- a. Agency identification information,
- b. Summary report of administrative expenses in a format consistent with the PCFO's budget submitted in accordance with the campaign plan, and
- c. Current year and if possible three additional years of information for:
 - 1. Number of employees,
 - 2. Number of donors,
 - 3. Percentage of participation,
 - 4. Total amount pledged/contributed,
 - 5. Percentage change in giving,
 - 6. Per capita gift,
 - 7. Average gift,
 - 8. Number of leadership donors
 - 9. Amount pledged by leadership donors
 - 10. Number of employees donating on-line and
 - 11. Summary information for the items above
 - 12. Contact information for the head of the agency

- 2). Provide to the LFCC(s) a detailed report of actual CFC administrative expenses with itemized receipts by March 15, 2018. The expenses report must be in a format that can be reconciled with the PCFO's budget submitted in accordance with the campaign plan. Reimbursement will not be made to the PCFO without the prior LFCC(s) written approval pursuant to 5CFR 950.106. The PCFO's failure to follow this protocol is grounds for termination of the agreement.
- 3) Provide to the LFCC a copy of the OPM form 1417 Summary report- campaign performance results using the Online Form 1417 posted on the CFC website at www.opm.gov/cfc when submitted to OPM. The OPM form 1417 for the campaign will be transmitted electronically via E-mail to OPM. Additionally, interest earned on the bank accounts used to deposit CFC contributions must be reported on the OPM Form 1417 and reported separately to the LFCC. The 1417 must be completed by March 1st. Additionally, interest earned on the bank accounts used to deposit CFC contributions must be reported on the OPM Form 1417.
- 4) Provide to the LFCC(s) a copy of the PCFO notice to federations and organizations of the amount designated, if any, and the amount allocated from undesignated contributions by February 16, 2018.
- 5) Provide to the LFCC(s) by February 16, 2018, a copy of the list of donors that requested their name and address to be released to recipient organization or an affidavit indicating that the list of donors was submitted.
- 6) Provide to the LFCC a copy of the notice to federations and organizations of the initial disbursement or affidavit indicating that the initial disbursement occurred on June 1, 2018 and quarterly thereafter.
- 7) Submit to the LFCC(s) an audit of collections and disbursements for the campaign disbursements no later than June 15, 2018.
- 8) Provide to the LFCC(s) a comprehensive list of campaign awards and incentives, the amount to be purchased, and cost to the campaign.
- 9) Provide documents or information requested by the LFCC(s) and/or the Director, CFC Operations, OPM, within 10 calendar days of the receipt of that request.
- 10) Support, as needed, the LFCC(s) oversight responsibilities by convening sessions to support milestone progress reports of the campaign's compliance with CFC regulations and OPM guidance.
- 11) Respond, in a timely and appropriate manner, to reasonable inquiries from participating organizations by (a) reporting donor information to recipient organizations; and (b) maintaining and reporting CFC donor designations to receiving organizations apart and separate from other funding sources so as to ensure that CFC funding are uniquely identifiable and reconcilable.

5.2.7 CLIN 0100 DELIVERABLE SCHEDULE

<i>No.</i>	<i>Deliverable</i>	<i>Reference</i>	<i>Schedule</i>	<i>Deliver To</i>
1.	Deliverables described in 5 CFR 950.105 and 950.401(a) including compliance assessment	Paragraph 5.2.6 (a)	As specified in 5 CFR 950.105 and 950.401(a), and by September 15 of the campaign year for the Compliance Assessment	LFCC or as specified in 5 CFR 950.105 and 950.401(a)
2.	Annual Contributor's Guide	Paragraph 5.2.6 (b)	Within 10 calendar days of the start of the campaign year	LFCC
3.	LFCC Management Information Reports	Paragraph 5.2.6 (d)1	By the 10 th calendar day of each month during the campaign period; complete set due by March 15 th of the campaign year	LFCC management (Chair and Vice Chair)
4.	Annual CFC Administrative Expenses	Paragraph 5.2.6 (d)2	By March 15 th of the campaign year	LFCC management (Chair and Vice Chair)
5.	Copy of OPM Form 1417	Paragraph 5.2.6 (d)3	Within 5 calendar days after submission to OPM by March 1 st of the campaign year	LFCC Chair
6.	PCFO Notice to Federations and Organizations	Paragraph 5.2.6 (d)4	By February 16 th of the campaign year	LFCC Chair
7.	List of Donors	Paragraph 5.2.6 (d)5	By February 16 th of the campaign year	LFCC Chair
8.	Notice to Federations and Organizations of Initial Disbursements & Affidavit	Paragraph 5.2.6 (d)6	By June 15 th of the campaign year and quarterly thereafter	LFCC Chair
9.	Audit Collections and Disbursements	Paragraph 5.2.6 (d)7	By June 15 th of the campaign year	LFCC

<i>No.</i>	<i>Deliverable</i>	<i>Reference</i>	<i>Schedule</i>	<i>Deliver To</i>
10.	Comprehensive List of Campaign Awards and Incentives	Paragraph 5.2.6 (d)8	By June 15 th of the campaign year	LFCC
11.	Documents or Information requested by the LFCC and/or the Director, CFC Operations, OPM	Paragraph 5.2.6 (d)9	Within 10 calendar days of request	LFCC and/or OPM
12.	Support LFCC oversight	Paragraph 5.2.6 (d)10	As requested by the LFCC	LFCC
13.	Responses to Inquiries from Participating Organizations	Paragraph 5.2.6 (d)11	Within 10 calendar days of request	Participating Organization
14.	Analysis of the Previous Year's Campaign and Wrap-Up Summary	Paragraph 5.2.5(a)	By March 15th of the campaign year	LFCC
15.	Campaign Promotional Material	Paragraph 5.2.5(f)	As requested by the LFCC	LFCC
16.	Campaign Annual Report	Paragraph 5.2.5(f)	By July 31 st of the campaign year	LFCC
17.	Training Material for Loaned Executive/Account Manager and Coordinators/Key Workers	Paragraph 5.2.5(g)	As requested by the LFCC	LFCC
18.	Web-based CFC site and updates	Paragraph 5.2.5(h)	Within 10 calendar days of the start of the campaign year, and on-going as updates are available	LFCC

5.2.8 CLIN 0200 DELIVERABLE SCHEDULE

<i>No.</i>	<i>Deliverable</i>	<i>Reference</i>	<i>Schedule</i>	<i>Deliver To</i>
1.	Deliverables described in 5 CFR 950.105 and 950.401(a) including compliance assessment	Paragraph 5.2.6 (a)	As specified in 5 CFR 950.105 and 950.401(a), and by September 15 of the campaign year for the Compliance Assessment	LFCC or as specified in 5 CFR 950.105 and 950.401(a)
2.	Annual Contributor's Guide	Paragraph 5.2.6 (b)	Within 10 calendar days of the start of the campaign year	LFCC
3.	LFCC Management Information Reports	Paragraph 5.2.6 (d)1	By the 10 th calendar day of each month during the campaign period; complete set due by March 15 th of the campaign year	LFCC Chair
4.	Annual CFC Administrative Expenses	Paragraph 5.2.6 (d)2	By March 15 th of the campaign year	LFCC Chair
5.	Copy of OPM Form 1417	Paragraph 5.2.6 (d)3	Within 5 calendar days after submission to OPM by March 1 st of the campaign year	LFCC Chair
6.	PCFO Notice to Federations and Organizations	Paragraph 5.2.6 (d)4	By February 16 th of the campaign year	LFCC Chair
7.	List of Donors	Paragraph 5.2.6 (d)5	By February 16 th of the campaign year	LFCC Chair
8.	Notice to Federations and Organizations of Initial Disbursements & Affidavit	Paragraph 5.2.6 (d)6	By June 15 th of the campaign year and quarterly thereafter	LFCC Chair
9.	Audit Collections and Disbursements	Paragraph 5.2.6 (d)7	By June 15 th of the campaign year	LFCC

<i>No.</i>	<i>Deliverable</i>	<i>Reference</i>	<i>Schedule</i>	<i>Deliver To</i>
10.	Comprehensive List of Campaign Awards and Incentives	Paragraph 5.2.6 (d)8	By June 15 th of the campaign year	LFCC
11.	Documents or Information requested by the LFCC and/or the Director, CFC Operations, OPM	Paragraph 5.2.6 (d)9	Within 10 calendar days of request	LFCC and/or OPM
12.	Support LFCC oversight	Paragraph 5.2.6 (d)10	As requested by the LFCC	LFCC
13.	Responses to Inquiries from Participating Organizations	Paragraph 5.2.6 (d)11	Within 10 calendar days of request	Participating Organization
14.	Analysis of the Previous Year's Campaign and Wrap-Up Summary	Paragraph 5.2.5(a)	By March 15th of the campaign year	LFCC
15.	Campaign Promotional Material	Paragraph 5.2.5(f)	As requested by the LFCC	LFCC
16.	Campaign Annual Report	Paragraph 5.2.5(f)	By July 31 st of the campaign year	LFCC
17.	Training Material for Loaned Executive/Account Manager and Coordinators/Key Workers	Paragraph 5.2.5(g)	As requested by the LFCC	LFCC
18.	Web-based CFC site and updates	Paragraph 5.2.5(h)	Within 10 calendar days of the start of the campaign year, and on-going as updates are available	LFCC

5.2.9 OPTIONAL CLIN 0300 DELIVERABLE SCHEDULE

<i>No.</i>	<i>Deliverable</i>	<i>Reference</i>	<i>Schedule</i>	<i>Deliver To</i>
1.	Deliverables described in 5 CFR 950.105 and 950.401(a) including compliance assessment	Paragraph 5.2.6 (a)	As specified in 5 CFR 950.105 and 950.401(a), and by September 15 of the campaign year for the Compliance Assessment	Each LFCC or as specified in 5 CFR 950.105 and 950.401(a)
2.	Annual Contributor's Guide (may be combined)	Paragraph 5.2.6 (b)	Within 10 calendar days of the start of the campaign year	Each LFCC
3.	LFCC Management Information Reports	Paragraph 5.2.6 (d)1	By the 10 th calendar day of each month during the campaign period; complete set due by March 15 th of the campaign year	Each LFCC Chair
4.	Annual CFC Administrative Expenses	Paragraph 5.2.6 (d)2	By March 15 th of the campaign year	Each LFCC Chair
5.	Copy of OPM Form 1417	Paragraph 5.2.6 (d)3	Within 5 calendar days after submission to OPM by March 1 st of the campaign year	Each LFCC Chair
6.	PCFO Notice to Federations and Organizations	Paragraph 5.2.6 (d)4	By February 16 th of the campaign year	Each LFCC Chair
7.	List of Donors	Paragraph 5.2.6 (d)5	By February 16 th of the campaign year	Each LFCC Chair
8.	Notice to Federations and Organizations of Initial Disbursements & Affidavit	Paragraph 5.2.6 (d)6	By June 15 th of the campaign year and quarterly thereafter	Each LFCC Chair
9.	Audit Collections and Disbursements	Paragraph 5.2.6 (d)7	By June 15 th of the campaign year	Each LFCC Chair

<i>No.</i>	<i>Deliverable</i>	<i>Reference</i>	<i>Schedule</i>	<i>Deliver To</i>
10.	Comprehensive List of Campaign Awards and Incentives	Paragraph 5.2.6 (d)8	By June 15 th of the campaign year	Each LFCC Chair
11.	Documents or Information requested by the LFCC(s) and/or the Director, CFC Operations, OPM	Paragraph 5.2.6 (d)9	Within 10 calendar days of request	Each LFCC and/or OPM
12.	Support LFCC(s) oversight	Paragraph 5.2.6 (d)10	As requested by the LFCC(s)	Each LFCC
13.	Responses to Inquiries from Participating Organizations	Paragraph 5.2.6 (d)11	Within 10 calendar days of request	Participating Organization
14.	Analysis of the Campaign and Wrap-Up Summary	Paragraph 5.2.5(a)	By March 15th of the campaign year	Each LFCC Chair
15.	Campaign Promotional Material (may be combined)	Paragraph 5.2.5(f)	As requested by the LFCC(s)	Each LFCC
16.	Campaign Annual Report	Paragraph 5.2.5(f)	By July 31 st of the campaign year	Each LFCC Chair
17.	Training Material for Loaned Executive/Account Manager and Coordinators/Key Workers (may be combined)	Paragraph 5.2.5(g)	As requested by the LFCC(s)	Each LFCC
18.	Web-based CFC site and updates (may be combined)	Paragraph 5.2.5(h)	Within 10 calendar days of the start of the campaign year, and on-going as updates are available	Each LFCC

PART II

6. INSTRUCTIONS, CONDITIONS AND NOTICES TO APPLICANTS

All application proposals must comply fully with the RFP. Only proposals addressing all of the key elements and outlining task definitions detailed herein will be considered.

6.1 APPLICATION ELIGIBILITY

Only federations, charitable organizations or combinations thereof may serve as the PCFO.

6.2 INQUIRIES

Any questions, inquiries or correspondence pertaining to the RFP must be received **no later than 12:00 p.m. EST on January 12, 2016**. All questions, inquiries, and correspondence related to this solicitation must clearly identify the RFP title and must be submitted via e-mail to Mary Doherty, at the following e-mail address: Mary.Doherty@dot.gov. Questions, inquiries or correspondence received after this date will be answered only if determined by the LFCC's to be in the best interest of the government. **NO ORAL INQUIRIES WILL BE ANSWERED**. Any additions, deletions or changes to this RFP will be made in the form of a written amendment. Each amendment will be identified by number and receipt thereof must be acknowledged by each Applicant.

6.3 PROPOSAL SUBMISSION INSTRUCTIONS

All application proposals and supporting materials must be submitted *electronically* and be received no later than **3:00 PM EST on January 22, 2016**.

Applicants should be aware that in-person oral presentations with the LFCC Review Team in Cambridge, MA during the week of February 1, 2016 or February 8, 2016 are required. Interested organizations should submit their complete application proposal electronically by e-mail to the following:

Mary Doherty, Director, Office of Acquisitions
DOT/Volpe Center
Vice Chair, Eastern MA LFCC
Mary.Doherty@dot.gov

Please note, only electronic copies submitted via email, to Mary Doherty (and time stamped by 3:00 PM) will be accepted. Hard copies will only be accepted when an applicant demonstrates a significant hardship in sending an electronic version. (Scanned versions of hard copies and / or attachments sent electronically will be accepted.)

For informational purposes, Applicants should make note that the e-mail account to which application proposals will be submitted has the capacity to receive messages with attachments up to ten (10) megabytes (MB) in total size. Applicants are responsible for insuring that their application proposals are suitable for receipt at this e-mail account based on this capacity.

6.4 APPLICATION PROPOSAL FORMAT

This section specifies the format that Applicants shall use to prepare their proposals to ensure a certain degree of uniformity in the format of response to facilitate evaluation.

6.4.1 Text

The Applicant's application proposal (Volumes I and II) shall be prepared in standard 8 ½ x 11 format in Portrait orientation. Proposal pages shall be consecutively numbered. Each page must have a 1-inch margin on the top, bottom, and each side. Page numbers, notations of proprietary information, and any other identifying information printed on each page are excluded from the margin requirement. Text font shall be no smaller than 11 point. Exceptions to these restrictions are text included on figures (including the budget exhibit), charts, graphics, and/or matrices that may be reduced to 8 point.

6.4.2 Slides

The Applicant's oral presentation slides (Volume II) shall be prepared in Microsoft PowerPoint format. Slides shall be consecutively numbered. There are no restrictions on font size; however, text on slides should be legible when displayed as a presentation. Applicants may include organizational name and/or logo on the slides.

6.4.3 Volume I – Written Technical Submission

This volume shall consist of four clearly labeled sections:

- Section 1, **ORGANIZATIONAL CAPACITY AND CAPABILITY.**
- Section 2, **PRIOR EXPERIENCE**
- Section 3, **PLEDGE SUPPORT PLAN AND REQUIRED STATEMENTS AND CERTIFICATIONS**
- Section 4, **CAMPAIGN PLAN (INCLUDING MARKETING**

6.4.4 Volume II – Oral Presentation

This volume must contain the slides the Applicant intends to present during its oral presentation.

6.4.5 Volume II - Written Financial and Budget Submission

This volume must contain the Applicant's Financial Management Plan and budget.

6.4.6 Organization and Appearance

The Applicant's application proposal should be concise and explicit. Elaboration of general experience in non-related activities will detract from the quality of the proposal. All qualifications, experience, and capabilities should relate to the services required by the Statement of Work. Legibility, conciseness, completeness, clarity of content, and coherence are important since they will facilitate the evaluation procedure and will also assure maximum credit being properly assigned to the various aspects of the application proposal.

6.4.7 Page Limits

Written Technical Material (Volume I): The maximum number of pages (excluding title page) that may be submitted, is 30.

Oral Presentation (Volume II): There is no page limit for the oral presentation slides; however, the production and use of an excessive number of slides may not be in the best interest of the Applicant. Time limits associated with the oral presentation are provided in Section 6.7.1.

Written Financial and Budget Material (Volume II): The maximum number of pages (excluding title page) that may be submitted, is 10.

6.5 EVALUATION PROCESS

The evaluation process has been designed to minimize the evaluation costs of both the Applicant and the LFCC's. It reduces the Applicant's written submission to essential information upon which to discriminate among Applicants.

After the receipt of proposals every eligible Applicant must make a structured oral presentation to the LFCC Review Team. The slides that will be presented at the oral presentation are to be submitted in Volume II, Oral Presentation. Applicants may NOT change their presentation slides after submission. The LFCC Review Team will not be provided with copies of the slides until immediately before each oral presentation. Applicants may not hand out any written material at the oral presentation. The purpose of these restrictions is to assure Applicants of the fairness and integrity of the oral presentation process.

It is expected that the oral presentations will be held at the U.S. Department of Transportation's John A. Volpe National Transportation Systems Center in Cambridge, MA during the period from February 1, 2016 through February 12, 2016. The order in which Applicants will make their presentations will be determined by a drawing of lots by the LFCC Review Team Chair after receipt of application proposals. All Applicants will receive notification by e-mail at least 7 calendar days in advance of the date and time of their scheduled presentation. All Applicants will be asked to confirm their scheduled presentation date and time and to provide a list of their attendees and the attendees' affiliations. Requests from Applicants to reschedule their

presentations will not be entertained unless unusual and compelling reasons are presented to the LFCC Review Team. No rescheduling of presentations will be done unless determined necessary to resolve unanticipated problems or delays encountered in the presentation process.

6.6 VOLUME I – WRITTEN TECHNICAL MATERIAL

Any federation, charitable organization or combinations thereof seeking to be selected for the PCFO must submit a timely application pursuant to the RFP deadlines and submit a written proposal, and oral presentation, addressing the tasks and requirements in the statement of work. The proposal will be utilized by the LFCC's to evaluate the applicants for PCFO to act as its fiscal agent and campaign coordinator as described in this solicitation.

Applicants may respond for one of the individual campaigns (CLIN 0100 or 0200) or the combined campaigns (CLIN 0300). Applicants must clearly indicate the CLIN number with each offer submitted, and are encouraged to submit multiple offers.

6.6.1 ORGANIZATIONAL CAPACITY AND CAPABILITY

Applicants must provide evidence of the organizational capacity, capability, and experience to meet the requirements of the statement of work **for each offer submitted by CLIN**. The ability of the applicant to successfully meet the requirements of a PCFO outlined in the SOW should be detailed. Proposals must include a discussion of the organizational structure that will be used to support these requirements, including the assigned personnel and their management reporting structure. Factors to be considered are:

- a. Experience managing charitable fund raising initiatives on behalf of charitable organizations or analogous solicitation campaigns.
- b. Staffing plan and resumes of staff proposed to perform PCFO services. **[Note, for CLIN 0300, the applicant is not required to have a physical presence in both campaign areas as long as the required services can be provided. Local staff at a satellite office in one of the two campaign areas is acceptable, but not required.]**
- c. Evidence of capacity to conduct an efficient and effective CFC, apart from the applicant organization's own campaign or other campaigns for which it serves as a contractor.
- d. Plans for integration of web-based charity lists, and support to the LFCC(s) in processing charitable organization applications including plans for dissemination of information about the application process.
- e. Description of how the applicant will afford federated groups and agencies in the local campaign adequate opportunity for input regarding the overall campaign, including print campaign materials and training and the process that federated groups and agencies must use to attend or participate in approved campaign meetings, kick-off events, charity fairs, and training sessions.
- f. Description of how applicant intends to fulfill the reporting requirements outlined in the RFP.

6.6.2 PRIOR EXPERIENCE

Applicants must provide detailed relevant, recent (past five years) past performance on similar efforts including for whom the work was done, the scope of the effort, and any program

references that may assist in verifying the quality of the work performed. The Applicant shall select three (3) efforts it considers the most relevant in demonstrating its ability to perform the proposed effort, and provide copies of any performance evaluation reports for these efforts. If written performance evaluation reports are unavailable, applicant shall state so and provide the following information:

1. Name and address of customer
2. Agreement Number (as applicable) and value
3. Description of work
4. Point of Contact address, telephone number and e-mail address
5. Assessment of relevance to requirements identified in this solicitation.
6. Whether any final or interim performance report was or has been issued

6.6.3 PLEDGE SUPPORT PLAN AND REQUIRED STATEMENTS AND CERTIFICATIONS

Applicants must provide a Pledge Support Plan for **each offer submitted by CLIN**. The plan should include a succinct description of the process of transferring donations to charities, including the system for reconciliation of the donor's original pledge amounts with the final distribution, ability to meet pledge processing and fund distribution requirements of the SOW including training, technology related capacity to perform the pledge support and reporting requirements of the SOW, and ability to meet mandatory and ad hoc reporting. Plan should include approaches to and degree of checks and balances offered to ensure transparency, accountability and integrity of the pledge support process and systems.

The following are required statements and certifications that must be submitted as part of the application.

A statement pledging to:

- a. Administer the CFC fairly and equitably
- b. Conduct campaign operations such as training, kick-off and other events, and fiscal operations, such as banking, auditing, reporting and distribution separate from the applicant's non-CFC operations.

Certification and acknowledgements:

- a. Certify the PCFO will abide by the directions, decisions, and supervision of the LFCC and/or Director.
- b. Acknowledge the applicant is subject to the potential sanctions of §950.403 and §950.603.
- c. Acknowledge the applicant is subject to the provisions of §950.202 and §950.203.

6.6.4 CAMPAIGN PLAN (INCLUDING MARKETING)

Applicants must provide an Overall Campaign Plan for the campaign that includes marketing plans **for each offer submitted by CLIN**. The Campaign Plan must cover the entire performance period and must include an operating plan in sufficient detail to allow the LFCC Review Team to assess how the applicant will administer an efficient and effective CFC.

The campaign plan should also specifically address an overall campaign strategy that describes:

- a. How the PCFO will afford federated groups and agencies in the local campaign adequate opportunity for input regarding the overall campaign, including print campaign materials and training.
- b. The process that federated groups and agencies must use to attend or participate in approved campaign meetings kick off events, charity fairs, and training sessions.
- c. The process that will provide federated groups, agencies, and the general public the opportunity to review at the PCFO office all reports, budgets, audits, training materials, and other records pertaining to the CFC.
- d. The procedures for ordering, delivering and tracking campaign materials.
- e. An in-depth marketing plan highlighting the specific steps that the Applicant will take before, during and after the campaign to ensure the goals and desired outcomes are realized. This plan should provide a description of plan for federal employee education and outreach including timing and schedule of proposed activities. Note, applicants must perform this function as a part of or coinciding with pledge drive requirements.
- f. The internal policies and procedures to be used to safeguard the use of the CFC logo, CFC references, and/or contributor names on or included in invitation notices, letters, donor recognition awards or promotional materials without prior LFCC approval.
- g. The process for providing campaign management support to include factors such as proactive customer service and systems for handling inquiries; proposed management and implementation of quality controls for production of an accurate CFC brochure; feasibility plans for establishing a network of CFC volunteers and campaign workers, and submission of a comprehensive campaign management planning calendar.
- h. **For CLIN 0300, anticipated campaign efficiencies and improved effectiveness given the combination of campaign areas.**

6.7 VOLUME II - ORAL PRESENTATION

Volume II shall consist of the slides that the Applicant intends to present during its oral presentation, and address the following two (2) areas:

1. ORGANIZATIONAL STRUCTURE AND STAFFING

The Applicant shall provide a detailed description of the organization's structure and how the proposed PCFO program will fit into the existing structure **for each offer submitted by CLIN**. In addition, the applicant shall present its staffing plan that demonstrates the qualifications of the Applicant's proposed personnel in terms of technical expertise, experience and accomplishments relevant to the requirements of this solicitation, and outlines the roles and responsibilities of the proposed staff to perform PCFO services.

2. OVERALL CAMPAIGN PLAN

The Applicant shall provide a detailed description of the organization's overall campaign plan **for each offer submitted by CLIN**. The applicant shall describe how it intends to perform the work described in the solicitation, including a discussion of the methods, activities, projected outcomes, and timing for performing the required tasks.

The campaign plan description shall be in sufficient detail to allow the LFCC to assess how the applicant will administer an efficient and effective CFC, under the directions of the LFCC. The description should explain how the CFC would be supported as a separate campaign; apart from the applicant organization's own campaign or other campaigns for which it serves as a contractor.

6.7.1 PRESENTATION AND STRUCTURED QUESTION-AND-ANSWER SESSION

The Applicant will have 1.5 hours to present its approach for the two (2) Areas identified in Section L.3.B.1. The oral presentation shall begin with the introduction of presenters and other members of the Applicant's team by name, proposed position, and company affiliation.

The Applicant's presentation (e.g., content, appearance, quality, design) will be considered as part of the overall evaluation. Time limits associated with the structured oral presentation are provided in below.

After the Applicant's presentation, there will be a two (2) 20-minute structured question-and-answer (Q&A) sessions as detailed below.

The oral presentation schedule is summarized in the following table.

Oral Presentation Schedule

No.	Evaluation Area	Topic	Time Limit	Presenters
1	Organizational Structure and Staffing Plan	Presentation on the Applicant’s Organizational Structure and Staffing Approach as identified in Section.6.6.1(b)	45 minutes	Any individuals for whom resumes were submitted as part of the Proposal
2	Organizational Structure and Staffing Plan	Structured Q&As on Organizational Structure and Staffing Plan	20 minutes	Any individuals for whom resumes were submitted as part of the Proposal
	Break		10 minutes	
3	Overall Campaign Plan	Presentation on the Applicant’s Overall Campaign Approach and Plan as identified in Section 6.6.4	45 minutes	Any individuals for whom resumes were submitted as part of the Proposal
4	Overall Campaign Plan	Structured Q&As on Overall Campaign Plan	20 minutes	Any individuals for whom resumes were submitted as part of the Proposal

6.7.2 FACILITIES AND PRESENTATION LOGISTICS

Location and Logistics

All presentations will take place at the Volpe Center, 55 Broadway, Cambridge, Massachusetts, in a meeting room sufficiently large enough to hold 20 people. The Applicant will present and respond to the structured Q&As from the front of the room. The LFCC shall provide a computer equipped with Microsoft Office 2007 and an overhead projector for the Applicant to use during its oral presentation. The Applicant may NOT change its presentation slides after proposal submission.

The LFCC Review Team will not consider the slides to be stand-alone documents or evaluate the information on the slides except as visual aids to the presentation. When reviewing and evaluating the Applicant’s structured oral presentation, the LFCC Review Team will not review any slide that was not projected and addressed during the presentation. Applicants may not hand out any written material at the oral presentation. The LFCC Review Team will not accept for evaluation any documentation in addition to the information submitted with the application

proposal. What the presenters say during the oral presentation will take precedence over the information that appears on the slides.

Participants and Attendees

The Applicant may bring no more than six (6) persons to the structured oral presentation, including no more than two non-presenting Applicant officials or employees.

6.8 VOLUME III – FINANCIAL MANAGEMENT PLAN AND BUDGET

The Applicant must present a PCFO financial management plan that presents a sound fiscal approach, and demonstrate adherence to the fiduciary responsibilities of 5CFR § 950.105. The plan should describe internal controls designed to provide reasonable assurances that the fiduciary responsibilities of 5 CFR § 950.105 will be achieved. The financial management plan must also specifically address the system for reconciliation of original pledge amounts with final distribution of funds. Emphasis should be on the approaches to and degree of checks and balances that are offered to ensure the accountability and integrity of the system.

The applicant must present a Campaign Budget and Budget Justification. Three complete budgets based on projected expenses for the 2013-14, 2014-15 and 2015-2016 must be presented along with a narrative justification explaining rationale or formulas used in calculating major cost categories (see Exhibit A). The budget must contain sufficient details for the LFCC to understand the costs associated with operating the CFC. The budget must be prepared based on projected expenses and not based on a percentage of the funds raised in the campaign

6.9 APPLICATION PROPOSAL EVALUATION CRITERIA

The evaluation criteria to be used in evaluating Applicant capabilities are listed below. Each criterion bears equal weight in the evaluation.

- Organizational capacity and structure, and capability of proposal staff;
- Prior relevant experience;
- Pledge Support;
- Campaign and marketing plan; and
- Fiscal Accountability Plan and Budget.

Exhibit A - Budget Format

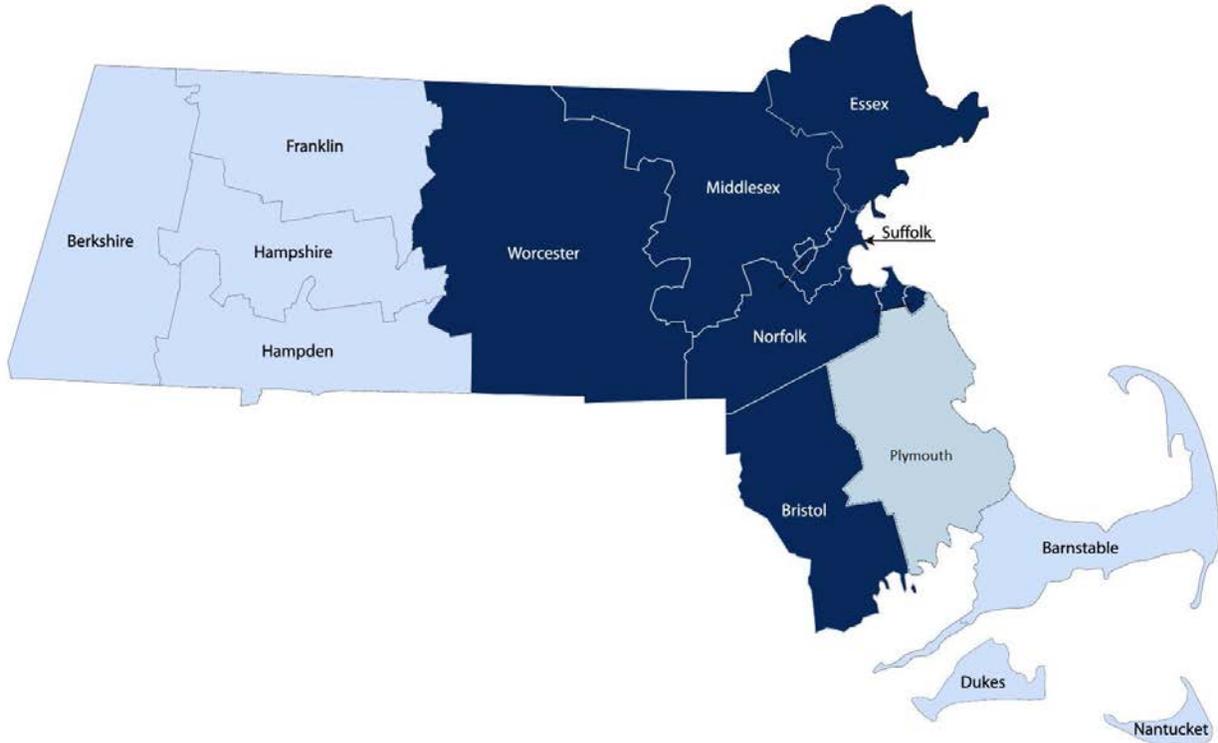
Please submit separate budgets for each campaign year

CFC Sample Campaign Budget

Salaries -by individual position-include all temporary positions as well as status (full-time (FT) / part-time (PT))
Direct
Indirect
Employee Benefits
Direct
Indirect
Payroll Taxes
Direct
Indirect
Total Payroll Related Expenses
Direct
Indirect
Annual Audit
Campaign Processing
Supplies
Telephone
Postage & Shipping
Website
Design and Development
Maintenance and Update
Printing -list individual items (i.e., pledge cards, brochures)
Campaign Events –list individually (i.e., Kick Off, Recognition Program)
Campaign Marketing and Promotion
Awards
Local Transportation
Special Events
Staff & Volunteer Development

Total Expenses
Campaign Projection (i.e., Amount Raised)
Percent of CFC Expenses to Campaign

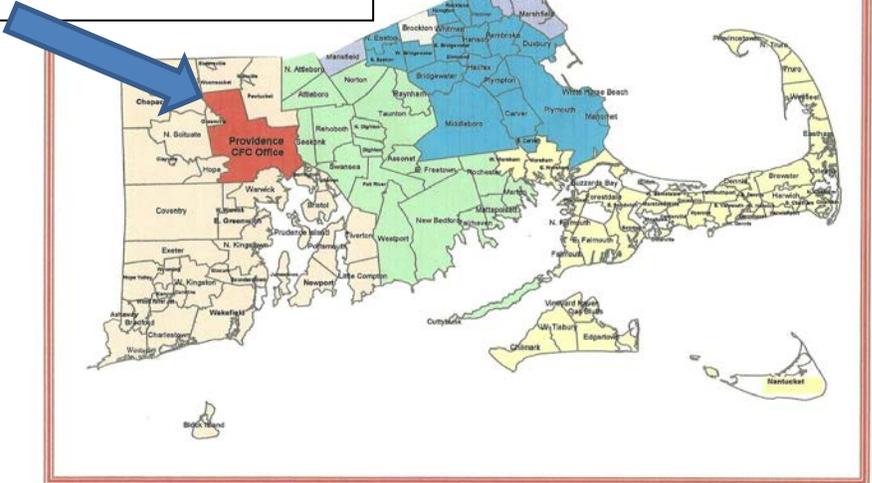
CFC of Eastern Massachusetts Campaign Territory



Middlesex County, Bristol County (Defense Contract Management Agency, Department of Veterans Affairs, Internal Revenue Service, and Social Security Administration employees only), Essex, Norfolk, Suffolk, and Worcester Counties, and Ft. Devens in Massachusetts

Rhode Island and Southeastern Massachusetts Campaign Territory

Note, a distinct local CFC office is not required for the 2016-2017 campaign; however, the PCFO must meet all requirements of the Statement of Work.



RHODE ISLAND
All Counties in RI

SOUTHEASTERN MASSACHUSETTS
(*Counties in SEMA)

**Plymouth,
Barnstable,
Bristol (National
Weather Service and
U.S. Postal Service
offices only),
Duke
Nantucket**

**Note: All other Massachusetts Counties are served by either the Eastern MA CFC or the Western MA CFC.*