

SUGGESTED REQUIREMENTS FOR USE IN SOLICITING APPLICATIONS FROM PRINCIPAL COMBINED FUND ORGANIZATIONS

DRAFT 15 Jan 03

2. Key Proposal Components:

Any federation, charitable organization or combinations thereof wishing to be selected for the PCFO must submit a timely application pursuant to the deadline set by the LFCC. Applicants must provide evidence of the organizational capacity, capability, and experience to meet the requirements of the statement of work, and submit a written campaign plan addressing the factors in the statement of work in Section One. The proposal will be utilized by the LFCC to evaluate the applicants for PCFO to act as its fiscal agent and campaign coordinator as described in this solicitation. The proposal must describe:

2.1. Organizational capacity and capability.

The ability of the applicant to successfully meet the requirements of a PCFO outlined in Section One above 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. Ability to meet pledge processing and fund distribution requirements and overall technology related capacity to perform the requirements of the solicitation
- c. Staffing plan with the roles and resumes of the people proposed to perform PCFO services
- d. Description of the organization's structure and how the proposed PCFO program will fit into the existing structure

2.2. Prior Experience.

The applicant should detail relevant, recent 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.

2.3. Written Campaign Plan.

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Submit a written **campaign plan** sufficient in detail to allow the LFCC to assess how the applicant will administer an efficient and effective CFC. The plan must address the approach to methods that will be used to accomplish all tasks delineated in sections 1.2, as follows:

a. Financial Accountability. Include a detailed financial proposal explaining the approach to accomplishing all tasks delineated under Fiscal Accountability requirements of section 1.2.1. The PCFO financial management plan must present 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.

b. Pledge Support. The campaign plan must describe the approach to meeting requirements of section 1.2.2. The plan should include a succinct description of the process of transferring donations to charities, including the system for reconciliation of original the donor's original pledge amounts with the final distribution.

c. CFC Applications Processing Support. The campaign plan must describe the approach to meeting requirements of section 1.2.3; specifically the capability of the applicant to administratively support the LFCC.

d. Campaign Management Support. The campaign plan must describe the approach to meeting requirements of section 1.2.4. The plan should include how the planning calendar will be developed and executed, including a description of the employee solicitation, methods of solicitation, and timing of start-up.

e. Campaign Marketing. The campaign plan must describe the approach to meeting requirements of section 1.2.5. The plan should delineate the federal employee education and outreach program programmed for by the applicant.

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f. CFC Campaign Budget and Budget Justification. A complete budget based on projected expenses must be presented along with a narrative justification explaining rationale or formulas used in calculating major cost categories (see exhibit A).

g. Reporting requirements. The campaign plan must describe the approach to ensuring the requirements of section 1.2.6 are met.

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

- How the PCFO will conduct an efficient and efficient CFC , under the direction 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.

- 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.

- 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.

- 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.

- The procedures for ordering, delivering and tracking campaign materials.

- 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, or promotional materials without prior LFCC approval.

- The internal policies and procedures to be used to safeguard CFC donor recognition awards and promotional materials.

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2.4. Required Statements and certifications

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.

In addition, applicants must:

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

Exhibit A Budget Format

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CFC Campaign Budget

March 1 – February 28

Proposed	
Salaries	
Direct	
Indirect	
Employee Benefits	
Direct	
Indirect	
Payroll Taxes	
Direct	
Indirect	
Total Payroll Related Expenses	
Direct	
Indirect	
Annual Audit	
Campaign Processing	
Supplies	
Office	
Campaign	
Telephone	
Office	
Campaign	
Postage & Shipping	
Occupancy	
Staff	
Loaned Executives	
Warehousing	
Website	
Design and Development	
Maintenance and Update	
Legal Notice	

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Printing
Contract
Campaign Materials
Stationary and Reports
Internal
Campaign Materials
Stationary and Reports
Campaign Events
Direct (CFC only)
Indirect
Campaign Promotion
Campaign Video
Awards
Local Transportation
Special Events
Staff & Volunteer Development
Total Expenses
Campaign Projection
Percent of CFC Expenses to Campaign