

**CONFIDENTIAL REQUEST FOR PROPOSAL (RFP) FOR
SPONSORSHIP CONSULTING AND SALES SERVICES
ZETA PHI BETA SORORITY, INCORPORATED**

INTRODUCTION

Zeta Phi Beta Sorority, Incorporated, a District of Columbia nonprofit corporation (“Zeta Phi Beta”), with chapters throughout the United States of America and abroad, is requesting proposals through this “RFP” for services to develop and grow its corporate sponsorships through strategic identification, cultivation, solicitation and stewardship of sponsors.

Zeta Phi Beta invites proposals from interested parties with at least five (5) years demonstrated success in corporate sponsorship development, contacts with national businesses that support female-oriented organizations, African-Americans, non-profits and other similar aligning sectors. Must have excellent written and oral communications skills, superior organizational and project management skills, and strong technology skills, including proficiency in Microsoft Office Suite (PowerPoint, Word, Excel), Google Apps and project management software (Ex. Asana, Basecamp, Slack).

BACKGROUND

Zeta Phi Beta was founded at Howard University in Washington, DC on January 16, 1920. Since its inception, Zeta has continued its steady climb into the spotlight with programs designed to demonstrate concern for the human condition both nationally and internationally. The sorority takes pride in its continued participation in transforming communities through volunteer services from members and its auxiliaries. Zeta has chartered hundreds of chapters worldwide and has a membership of 100,000+.

Almost 100 years later, the Sorority is set to embark upon a journey that will celebrate the continued commitment to the ideals – Sisterhood, Service, Scholarship, and Finer Womanhood – established through the vision of its founding members.

The Centennial Commission is an ad-hoc committee of Zeta, in place from January 2015 through January 2021 to encompass our Centennial festivities through Founders’ Day celebrations. The objective of the Commission is to focus on strategic planning, promoting commemorative events and executing the 100-year celebration taking place in 2020 with major national events in January and June.

TIMELINE AND INSTRUCTIONS FOR SUBMISSION

Method of RFP Submission. Electronic submissions of the proposals are required and must be submitted to <http://zphib2020.com/request-for-proposals>.

Deadline for Proposals. All proposals submitted in response to this RFP must be received by Zeta Phi Beta no later than 5:00 p.m. Washington, D.C. time on November 30, 2018.

Interviews. Bidders may be invited to interview with Zeta Phi Beta leadership. If so, interviews are anticipated to take place December 4-7, 2018.

Notification. It is anticipated that notification of selection will occur on or about December 14, 2018.

All proposals and other documentation submitted in response to the RFP become Zeta Phi Beta's property and will not be returned by Zeta Phi Beta. Any material your firm deems confidential must be clearly marked confidential. All costs of responding to the RFP, including making a presentation to Zeta Phi Beta and any related travel expenses, are the responsibility of the responding bidder.

CONFIDENTIALITY

All information provided by Zeta Phi Beta in connection with the RFP, including the fact that Zeta Phi Beta has issued the RFP and is conducting a bidding process to select a service provider, is considered Zeta Phi Beta's confidential and proprietary information and must not be disclosed to anyone outside of your firm without Zeta Phi Beta's prior written approval.

RESERVATION OF RIGHTS

Zeta Phi Beta reserves the right to:

- a. Reject any proposal that is not received by the response deadline or is otherwise nonresponsive to the RFP.
- b. Reject any or all proposals submitted in response to the RFP.
- c. Request additional information from any submitter.
- d. Withdraw the RFP at any time and for any reason.
- e. Make multiple or partial bid awards.

After Zeta Phi Beta's review of all submitted proposals, it may (but is not required to) invite a short list of semi-finalist bidders to meet with Zeta Phi Beta representatives to make a presentation of their qualifications to Zeta Phi Beta. Zeta Phi Beta, in its sole discretion, may or may not make an award to any bidder and reserves the right to reject any and all proposals submitted in response to the RFP and to alter the review timeline.

SCOPE OF SERVICES REQUIRED

The selected bidder will provide a creative proposal that includes the following services.

- Identify and vet business partners, sponsors, and prospects.
- Review sponsorship material and create additional documents for potential sponsors.
- Upon approval, use updated pitch materials to engage potential partners and sponsors.
- Prepare customized proposals.
- Build probability metrics into proposals in conjunction with potential partners and sponsors.
- Ensure prompt acknowledgement of all communication.
- Co-manage the timely and accurate delivery of sponsor and donor benefits working with the National Sponsorship Team.
- Provide a final Excel spreadsheet with all companies contacted, when they were contacted, contact information (name, title, email and phone) and outcomes. A template will be provided for you with requested information.

TERM OF ENGAGEMENT

The term of the engagement is subject to negotiation of a definitive agreement. Upon entering into a satisfactory agreement, service should begin no later than December 21, 2018. Service will be complete on the earlier of March 1, 2020 or after the receipt of \$1,000,000 net of costs.

PROPOSAL CONTENTS

A response to this RFP must be compiled into a single PDF and must include the following sections in the order listed:

- a. A transmittal letter that:
 1. is signed by an authorized representative of the bidder; and
 2. identifies all materials and enclosures being forwarded in response to the RFP.
 3. lists the names of all members or former members of Zeta Phi Beta who are affiliated with the Firm. Any member of the Sorority who works on this project must not currently be subject to disciplinary action within the Sorority. If a member of the Sorority or former member of the Sorority who is proposed to work on the project has been subject to disciplinary action in the past, such disciplinary action must be disclosed within the response.

- b. A one-page executive summary providing an overview of the firm's history and capabilities that are relevant to this RFP.
- c. The bidder's responses to the topics set forth below. Bidders should respond to all topics in the same order as listed in this RFP and using the following titles and numbering. Failure to follow the format may result in disqualification.

Section I: Company Profile

- a. Provide the firm's:
 - 1. legal name;
 - 2. address for correspondence; and
 - 3. address of each office at which services will be provided, if more than one.
- b. Indicate the date your firm was established or the date you started providing services similar to those described in this RFP.
- c. Identify any outside vendors that your firm may use to provide the services required by this RFP and describe how those vendors will be managed.
- d. Indicate whether your firm has changed its ownership or structure in the past three years. If so, explain the circumstances requiring this change. If your firm anticipates making any significant changes to its ownership and structure in the future, please describe.
- e. Describe your firm's anti-discrimination and affirmative action/equal opportunity policies.
- f. Describe the participation of women and minorities in your firm by stating the percentage of women in executive leadership and the percentage of racial minorities in executive leadership.

Section II: Qualifications

- a. Provide a brief description of you and/or your firm, including its founding and history; number of employees; service areas; and, awards or other forms of recognition.
- b. Provide a description of your work process.
- c. Special consideration: Describe the experience with and knowledge of nonprofit fraternities and sororities among your firm's personnel, in the context of their careers.
- d. Special consideration: Describe why and how your firm is uniquely positioned to serve as Zeta Phi Beta's lead sponsorship consulting and marketing firm.
- e. Provide a representative listing of similar past engagements.

Section III: Experience and Ability to Perform this Work

- a. Describe the approach your firm would undertake to successfully complete the tasks described in the Scope of Work.
- b. Provide examples of relevant work and/or case studies.

Section IV: Staffing and Approach

It is Zeta Phi Beta's preference that there be a single point of contact to handle Zeta Phi Beta's scope of work. With this preference in mind, please describe your proposed staffing, including:

- a. Identifying the responsible person leading your firm's professional team, including all contact information for that person.
- b. Identifying all other individuals selected to perform the work described in this RFP. Provide each person's contact information and location. Also provide affiliation (if any) with any national fraternities, sororities, or social/civic organizations with a structure that includes chapters throughout the United States.
- c. Describing the role each individual would play in performing the work.
- d. Describing the professional qualifications and experience of each person involved in handling the work, including education, number of years engaged in performing work relevant to the scope of work in this RFP, and area(s) of specialization.
- e. Whether or not selected to become part of your firm's professional team for the scope of work, please list any professional or personal relationships any of your firm's attorneys may have with Zeta Phi Beta's officers, directors, or employees that go beyond having common membership in Zeta Phi Beta. Examples would be intake sister/line sister, family member, business partner, etc.

Section V: References

Provide a minimum of three (3) client references.

Section VI: Insurance and Liability

- a. Confirm that your firm has adequate errors and omissions insurance and professional liability insurance adequate for the scope of services to be provided.
- b. Confirm that all work will be conducted in accordance with all applicable laws and that sponsorships will be structured in such a way that will not incur Unrelated Business Income Tax for Zeta Phi Beta.

- c. Describe your disaster recovery plan and facilities.
- d. Describe measures that you currently undertake or plan to undertake to protect Zeta Phi Beta's information against cyber security risk.

Section V: Pricing

Provide the proposed pricing structure, including a schedule of fees, for the scope of services requested in the RFP. If your pricing structure includes billable hours, please provide an estimate of the annual number of hours required for each service to be provided.

Section VI: Other Information (Optional)

Provide any additional information that you believe is relevant to this RFP and you/your firm's capability to provide the services requested.

EVALUATION PROCEDURE AND CRITERIA

Zeta Phi Beta will review all submitted proposals to determine responsiveness to the RFP and may reject any nonresponsive proposal. Zeta Phi Beta will evaluate all submitted proposals with the objective that the selected bidder:

- a. Clearly demonstrates a thorough understanding of the engagement's scope.
- b. Has a demonstrated record of success on past similar engagements.
- c. Possesses adequate resources to handle all assigned responsibilities, including technology that is compatible with Zeta Phi Beta's.
- d. Assigns highly experienced, responsive, and professional people.
- e. Maintains high ethical standards.
- f. Prices its services competitively.

CONTACT INFORMATION

All questions about the RFP must be submitted to RFPSubmission@Zphib2020.com no later than 5:00pm EST on October 20, 2018 to receive a response. Responses to all questions will be sent via email as soon as practicable.

Bidders are prohibited from contacting any other Zeta Phi Beta member or other representative about this RFP. Failure to adhere to this requirement will be grounds for disqualifying your proposal.

If appropriate, the question (without identification of the questioner) and its answer will be emailed to all parties indicating an interest in responding to the RFP.