



Firms/ practices with nonprofit experience are invited to prepare a formal proposal to provide law consultation and counsel to United Way of Pennsylvania and its subsidiary, PA 211. This Request for Proposal (RFP) is intended to identify and ideally contract with a company that is qualified and has the capacity to meet our needs.

Proposals are due by March 16, 2020, by 4:30 p.m.

Background

United Way of Pennsylvania (UWP) is incorporated as a 501(c)(3) and it's a statewide membership organization for local United Ways in Pennsylvania. The primary functions the organization serves are: to advocate on behalf of the member network with state and federal policymakers, provide training and education to support the United Way network in Pennsylvania, and also deliver statewide impact projects such as the ALICE project and PA 211. All of UWP's activities support efforts to improve the education, health and financial stability of every Pennsylvanian, and the viability of the nonprofit network.

PA 211 is also a 501(c)(3) and as of January 1, 2020, it is a sole member subsidiary of United Way of Pennsylvania. PA 211 serves as the coordinating body for the statewide 211 network, which connects Pennsylvanians to resources in the community which may help meet their health and human services needs. PA 211 is a statewide service, and the 211 dialing code is reserved for the purpose of a health and human services information and referral line in Pennsylvania.

UWP retains reserve powers for PA 211:

- (a) To approve the adoption, amendment, modification or restatement of the Articles of Incorporation or Bylaws of the Corporation;
- (b) To approve the merger or consolidation of the Corporation with or into any other entity, the exchange of membership interests in the Corporation for membership (or other ownership) interests in any other entity, an affiliation or consolidation with any other entity, or any other type of reorganization involving the Corporation;
- (c) To approve any sale, transfer, long-term lease, long-term encumbrance, mortgage or disposition of all or substantially all of the Corporation's assets;

- (d) To approve any plan of dissolution or liquidation of the Corporation, and the right to determine the distribution of assets upon dissolution or liquidation of the Corporation;
- (e) To approve the annual operating and capital budgets for the Corporation and all strategic plans of the Corporation, including the discontinuance of any of the Corporation's programs, each following approval by the Board of Directors; and
- (f) The right to appoint the chief professional officer of the Corporation, with the right to remove the same with or without cause, following consultation with the Chairperson of the Corporation's Board of Directors.

Our Mission and Vision

Both UWP and its subsidiary, PA 211, will go through a strategic planning process in 2020. Following is current information about the mission and vision of each organization:

UWP Mission: To assist and champion the efforts of local United Ways.

UWP Vision: United Way of Pennsylvania envisions a Commonwealth where all individuals and families achieve their human potential through education, income stability, and healthy lives. It believes this can be accomplished by building and sustaining a United Way network committed to community impact, collaboration, and results.

PA 211 Mission: PA 211 is a telephone and text service, as well as a web search linking those in need to health, human and other community services.

Scope of Work

The successful company may be responsible for providing advice and counsel, and where necessary, representation in matters involving the following:

- Nonprofit law and Governance
- Compliance with tax exemption
- Contract review
- Labor and employment law
- Government relations (lobbying)
- Data sharing policies, specifically for PA 211 community resource database information which could be leased to health care intermediaries or other partners
- Public utility law and telecommunications law

Experience with nonprofit organizations is a priority for UWP and PA 211.

Submission Specifications

Please respond to the following questions/ requests:

1. Company Description – Please provide information on your company, the areas of specialization, number of practicing attorneys and support staff, locations, corporate culture, organizational chart and any other distinguishing factors.
2. Relevant Experience – Given the description of United Way of Pennsylvania and PA 211, as well as our identified needs, please provide examples of relevant experience. Take the opportunity to illustrate your position that you firm could serve us well.
3. Approach – How do you approach and assign work and direct talent? If we worked with you, how would activities be monitored? How do you define success? When necessary, how do you adjust or modify a plan or strategy that is not achieving the desired outcomes? How do you work with and communicate with clients?
4. Fee structure and Expenses – Explain your fee structure and the method you use to bill your clients. In addition, what form of business relationship will you prefer?
5. Principals and Key Players – Identify, specifically, who would be working on our account and how you will make these determinations in the future. (Please include resumés or CVs for primary players)
6. Please provide a list of any possible existing or potential conflicts of interest. This list shall identify any actual or potential conflicts of interest, and an outline of how such conflicts might be resolved.
7. Intangibles – Please introduce important information that was not generated by the previous questions, but which will help us understand your company as a potential match for our service needs.

Timeline for Selection Process

RFP Issued

January 31, 2020

Proposals Due

March 16, 2020 by 4:30 p.m.

UWP and PA 211 have an RFP Committee which will score responses, conduct interviews with top respondents in April and May, and make a recommendation to the UWP Board for a vote at its meeting on June 3, 2020.

Selection Criteria

Evaluation and selection of the RFP will be based on content and responsiveness to all proposal requirements. The evaluation criteria include a combination of:

- Experience: Nonprofit experience and relevant experience of the firm and individuals assigned to the project
- Expertise: Relative quality and depth of the firm’s expertise and individuals assigned to provide legal services
- Responsiveness: Overall organization, completeness and quality of the RFP response, including cohesiveness, conciseness and clarity of response

- Reference: Information provided by client references
- Diversity in representation
- Cost: the schedule of fees will be considered along with the qualifications of the proposers
- Interviews: The RFP selection committee will conduct interviews with its top candidates from the respondent pool

Scoring

The proposals will be scored and weighted on the following factors:

- 60% of ranking: Experience and expertise
- 20% of ranking: Diversity in representation
- 20% of ranking: Responsiveness, reference and cost

The committee will consider other qualitative factors in the interviews with top respondents.

Questions and submission

If you have questions, please contact UWP's President, Kristen Rotz. Please email your response and any attachments to krotz@uwp.org before 4:30 p.m. on March 16, 2020.

Thank you for your time and interest responding to this RFP.

Sincerely,

Kristen Rotz