



## REQUEST FOR PROPOSALS

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Philadelphia Local Initiatives Support Corporation (LISC) is requesting proposals from qualified individuals or firms to conduct an inventory of West-Philadelphia-based vendors and suppliers around a select list of commodities, and to create a database for maintaining an active list of West Philadelphia businesses.

LISC has engaged American Communities Trust (ACT) as project manager to work closely with the selected Consultant on this Scope of Services. **Proposals must be received by 5:00 PM on Tuesday, May 5, 2015.** Proposals and any questions should be emailed to Gregory Heller at [greg@actimpact.org](mailto:greg@actimpact.org).

The contract will be made with LISC. LISC will award the contract based on the evaluation criteria contained in this RFP. LISC reserves the right to accept or reject any or all proposals, to waive informalities and to reserve any RFP's. LISC also reserves the right to award the contract as it deems will best serve its interests.

### ABOUT PHILADELPHIA LISC

Philadelphia LISC is the local office of LISC, a national nonprofit community development organization that has invested \$14.7 billion in 30 cities across the United States. LISC combines corporate, government, and philanthropic resources to help community-based organizations revitalize underserved neighborhoods. Philadelphia LISC is a catalyst for community change, working with partners to strengthen neighborhoods and improve the lives of residents. Since 1980, Philadelphia LISC has invested \$380 million to build or preserve 7,800 affordable homes and apartments and develop 1.7 million square feet of retail, community, and educational space. LISC works with community partners to build sustainable communities, which includes: developing, preserving and investing in housing and other real estate; increasing family income and wealth; stimulating local and regional economic activity; improving access to quality education; fostering livable, safe and healthy environments; promoting arts and culture; and strengthening community leadership. For more information about LISC, visit [www.lisc.org](http://www.lisc.org) and the Philadelphia office at [www.lisc.org/philly](http://www.lisc.org/philly).

## TERMS

The following terms will apply to this RFP and to any subsequent contract. Submission of a proposal in response to this RFP indicates acceptance of all the following terms:

“Contract” means the written agreement resulting from this RFP executed by LISC and the Consultant;

“Consultant,” or “Provider” means the successful Applicant to this RFP who enters into a written Contract with LISC;

“LISC” means Local Initiatives Support Corporation;

“Firm,” “Proposer,” or “Bidder” means an individual or a company that submits, or intends to submit, a proposal in response to this “RFP.”

## GENERAL CONDITIONS

Services shall be provided as requested by LISC in compliance with the Scope of Services as described in this RFP. The Provider shall be compliant with all requirements specified in Exhibit A: “EXHIBIT A: General Terms Applicable to Consultancy Agreements.” The Provider shall maintain such records as are deemed necessary pursuant to LISC rules to assure a proper accounting for all costs and funds collected. These records shall be submitted for audit purposes to LISC. The Provider shall submit financial, program progress and other reports as requested by LISC. Information provided by LISC shall be used only for purposes intended and in accordance with federal and state laws and regulations.

## PROJECT BACKGROUND

The Scope of Services described in this RFP is part of LISC’s Economic Opportunity initiative to expand employment, enterprise and education pipelines between neighborhoods, institutions and businesses in West Philadelphia. To this end, in partnership with Drexel University, LISC is exploring new approaches to stimulate local economic development by aligning university spending with the supply of existing local companies in West Philadelphia, called Targeted Spend, Local Impact (TSLI). Drexel and its nearby neighborhoods are within the federally designated Promise Zone, and this project seeks to benefit the Promise Zone neighborhoods, businesses and residents, as well as a larger geography within West Philadelphia.

The TSLI project leadership team is Drexel University, American Communities Trust and Philadelphia LISC. The project team works with the Promise Zone leadership to ensure alignment of goals and priorities. The first phase of TSLI project analysis was funded by the Surdna Foundation.

This first phase work included:

- I. Analyze Drexel’s current spend and vendors
- II. Assess Drexel’s existing procurement infrastructure
- III. Economic analysis of potential insourcing
- IV. Study national best practices
- V. Launch Anchor Collaborative
- VI. Develop strategic approach and toolkit

The project focused on seven zip codes in West Philadelphia as the geography referred to as “local” (19104, 19131, 19151, 19139, 19143, 19142, 19153). Through this analysis the consultant team

identified the following as the “target commodities” that are most likely targets for a local spend pilot program:

**Professional Services**

- Design and Marketing Services
- Education Services

**Construction/Maintenance**

- Waste Management/ Remediation
- Grounds, Landscaping, and Snow
- Electrical
- Plumbing Services
- Roofing
- Other CFM
- Pest Management
- Cleaning/ Janitorial Services
- Building, Fire, and Security Services

**Transportation/Travel**

- Car Services
- Local Transportation
- Courier Service
- Relocation Services

**Facilities/Supplies**

- Cleaning/Janitorial Supplies
- Building Supplies and Equipment
- Food/Kitchen Supplies

The project identified the following major strategies for a pilot program:

1. Change the internal culture of anchors to value local procurement and see its benefits. Drexel is working on doing this internally, and is serving as a convener for other anchors to work toward a similar culture change.
2. Create a West Philadelphia Anchor Collaborative to build a mechanism for coordination and business partnerships. Drexel has convened this collaborative for its first meeting and intends to work with the other anchor members to make the collaborative become a long-term and sustainable entity.
3. Partner with an intermediary to provide technical assistance and capacity building for local vendors, while connecting them to procurement opportunities through the collaborative. This strategy has not yet been rolled out and the team has not yet determined whether an adequate intermediary exists or needs to be created/enhanced.

The next steps for moving this project forward are:

1. Create an inventory of local businesses and identify key gaps in the marketplace to learn what can be done to help existing businesses and incubate new ones.
2. Continue to convene and strengthen the Anchor Collaborative and develop strategic direction jointly within the Collaborative.
3. Working closely with the Collaborative, design a pilot operating model for an intermediary that will provide capacity building resources for local vendors.

## REQUESTED SCOPE OF SERVICES

The scope of services for which the project team seeks a Consultant, involves creating an inventory of West-Philadelphia-based businesses located within the seven zip codes listed above, and focused on the target commodities specified above. The team envisions this task as the first step in creating a local vendor, user-friendly database that would include business name, size and capacity, whether it is MBE/WBE, and other pertinent information that could inform potential buyers. Such a database would need to be housed somewhere and consistently maintained. The Consultant should be prepared to advise on the nature of who should maintain this database.

The tasks relating to this Scope of Services include:

1. Communicate with existing groups in Philadelphia, and create an inventory of businesses from existing lists. These groups should include (but need not be limited to) Philadelphia OEO, Commerce Department, Greater Philadelphia Chamber of Commerce, African American Chamber of Commerce, Hispanic Chamber of Commerce, The Enterprise Center, University City District, Councilwoman Jannie L. Blackwell's office, Sustainable Business Network of Greater Philadelphia, PEC-CDC, West Philadelphia Financial Services Institution, University City Science Center, Welcoming Center for New Pennsylvanians, Wharton SBDC, Manufacturing Alliance of Philadelphia, Goldman Sachs 10,000 Small Businesses program, and PIDC.
2. Talk to community-based organizations and business organizations on the ground in West Philadelphia to identify additional businesses.
3. Segment out a list of comprehensive list of businesses within the target commodities and array those businesses based on available data to group them based on capacity.
4. Interview at least eight (8) businesses, with at least one from each target commodity, that emerge as likely candidates for a local spend pilot, based on their capacity and alignment with target commodities.
5. Create an initial database of businesses that will serve as the foundation for building out into a more robust database. Identify the fields that will be part of this database (name, address, NAICS code, M/W/DSBE, etc.). Propose sustainability plan to house and maintain database.
6. Make recommendations on a) which businesses could participate in a pilot, b) generally what capacity building services those businesses need, c) who could house the database long-term.

## PROJECT MANAGEMENT

LISC has engaged American Communities Trust (ACT) as project manager to work closely with the selected Consultant on this Scope of Services. ACT is a nonprofit corporation, and one of the three lead partners on the TSLI initiative. The selected Consultant will coordinate closely with ACT and LISC, who will work to ensure that this work aligns with the overall TSLI project and that its outcomes lay the groundwork for future LISC's Economic Opportunity Initiative in West Philadelphia.

## TIMELINE

This project has a three-to-four-month timeline.

## COST OF SERVICES

The program has a committed dollar amount of \$30,000 to be spent on this Scope of Services. Consultant's budget may not exceed this amount.

## **PROPOSAL REQUIREMENTS**

Proposals should be no more than eight (8) typed pages. Components of the proposal must include all of the following:

1. Cover letter stating the name and legal address of the Consultant and signature by an individual who is legally permitted to sign on behalf of the Consultant.
2. Statement of qualifications and past experience of similar projects.
3. Proposed approach to carrying out this Scope of Services.
4. Statement on the Consultant's capacity to effectively carry out this work, including names and qualifications of all staff members who would be working on this project.
5. Proposed budget including details on all fees and projected reimbursable expenses.
6. Three professional references with contact information.

Proposals must be received by 5:00 PM on Tuesday May 5, 2015. Proposals should be emailed to [greg@actimpact.org](mailto:greg@actimpact.org).

## **PAYMENT**

LISC will approve all payments of funds for this project upon receipt of invoices. Chosen Consultant may invoice LISC every 30 days for work completed to date until completion of contract. LISC shall not be billed for, and reimbursement shall not be made for, time involved in activities outside of those defined in the Scope of Services.

## **CONSULTANT QUALIFICATIONS**

Proposals will be considered only from individuals who have experience and necessary equipment to provide the required services. LISC may request information substantiating the requirements. Failure to provide this information may result in a Consultant's proposal being declared non-responsive.

## **WRITTEN AGREEMENT**

The selected Consultant shall be required to enter into a written agreement with LISC. Signature on the Proposal Cover Sheet shall serve as an acknowledgement that the Consultant is willing to enter into an agreement with LISC if their proposal is accepted.

## **EVALUATION AND CONTRACT AWARD**

LISC shall evaluate and select a Consultant to provide the required services based on the completed proposal responses. LISC shall be the sole judge in determining how the evaluation process shall be conducted and what Consultant shall be considered for award as deemed to be in the best interest of this project.

## **PREPARATION OF PROPOSALS**

Failure to read the RFP and these instructions will be at the Consultant's own risk. If Consultant includes as part of the response to the RFP any information that the Consultant believes to be a trade secret or other privileged or confidential data, the Consultant must supply under separate cover and identify as confidential. Statements that the entire proposal is confidential will not be honored.

## **OMISSIONS**

Should LISC omit information from this RFP that is necessary for a clear understanding of the work, or should it appear that various instructions are in conflict, the Consultant shall secure written instructions from LISC.

## **DEBARMENT**

By submitting this proposal, the Consultant certifies that neither the company nor its principals is presently debarred, suspended, in the process of debarment, declared ineligible or voluntarily excluded from participation in this transaction by any federal state department or agency.

## **EQUAL OPPORTUNITY**

LISC adheres to a policy of equal opportunity and non-discrimination and will ensure that all Consultants will be treated fairly and equitably throughout the bidding process, including the advertisement, evaluation and selection stages.

## **COST OF DEVELOPING PROPOSALS**

All costs related to the preparation of the proposals and any related activities are the sole responsibility of the Consultant. LISC assumes no liability for any costs incurred by Consultants throughout the entire selection process.

## **PROPOSAL OWNERSHIP**

All proposals, including attachments, supplementary materials, addenda, etc. shall become the property of LISC and will not be returned to the Consultant.

## **ADDITIONAL GENERAL INFORMATION & CLARIFICATION**

For additional information or clarification concerning the services specified in this RFP under Scope of Services, interested parties must submit their questions or comments, in writing via e-mail, to Gregory Heller, [greg@actimpact.org](mailto:greg@actimpact.org). Questions will be received, answered in writing, and sent via e-mail.

## **TERMS AND CONDITIONS**

It is the responsibility of the Consultant to ensure that his/her Proposal is properly delivered to the required authority at the time and place designated in this RFP. LISC will notify unsuccessful Consultants in writing or by telephone within thirty (30) days following the receipt of the proposal. LISC silence does not imply any acceptance or rejection of any quotation offer. Issuance of this RFP does not constitute a commitment by LISC to award a contract. LISC reserves the right to reject any or all Proposals received in response to this RFP, to waive minor irregularities and informalities in Proposals received, or to cancel this RFP if it is in the best interest of LISC to do so. The Consultant agrees, if his/her Proposal is accepted by LISC, to furnish supplies and/or services in strict accordance with the Proposal specifications and at those prices set forth for each item in said Proposal.

## EVALUATION CRITERIA

LISC will analyze information provided by all Consultants. Criteria considered by LISC in ranking the proposed exercise coordination proposals will be as follows:

- Completeness of application
- Consultant costs fall within project budget
- Qualifications and past experience
- Appropriateness and creativity of proposed approach
- Consultant's capacity to carry out the work:
- Direct experience working in West Philadelphia highly desired.

## EXHIBIT A: General Terms Applicable to Consultancy Agreements

The specific terms of your consulting appointment with the Local Initiatives Support Corporation (LISC) are covered in your consultancy agreement. In addition, the following general terms apply:

1. Availability.

Consultants agree to render the services described in the individual letters of appointment at the times and places requested by LISC.

2. Relationship to LISC.

Consultants are not employees of LISC, but are independent contractors to LISC. LISC does not retain the right to control and direct consultants as to details and the means by which assignments are accomplished. Consultants agree not to represent themselves as LISC's agent or spokesman either during or after the period of their appointment, nor to make public any information relating to activities of LISC, its grantees or investees unless these have been announced by LISC. Consultants are subject to the administrative policies and procedures established by LISC for consultants.

3. Ownership of Work Product and Intellectual Property Rights.

Consultant agrees that any and all written materials, data, reports, notes, drawings, designs, formulas, software, source code, media, inventions, discoveries, and any other materials, whether electronic, print and/or any other format, created, developed, discovered and/or otherwise arising from the services provided to LISC by Consultant (collectively, the "Work Product") shall be deemed a "work made for hire" and shall be the sole and exclusive property of LISC. Consultant agrees that any and all right, title and interest of any kind and nature whatsoever in and to the Work Product, including, without limitation, copyrights, patents, trademarks, trade secrets and any other proprietary and intellectual property rights, shall be exclusively owned by LISC. Consultant agrees to deliver to LISC any and all Work Product, including, without limitation, any and all copies thereof, immediately upon completion of the services or as otherwise requested by LISC.

To the extent that any of the Work Product is deemed, by operation of law, to not be a work made for hire, Consultant hereby assigns to LISC the ownership all rights and title in and to such work, and LISC shall have the right to obtain and hold in its own name any trademark, copyright, patent, and any other registrations and similar protection which may be available in the Work Product. Consultant agrees to give LISC or its designees all assistance reasonably required to perfect such rights.

4. Confidentiality.

Consultant acknowledges that, during the course of providing services to LISC, Consultant and its employees and agents may have access to or otherwise become familiar with confidential information of LISC, including, without limitation, technical, non-technical, financial, business, strategic and/or any other information deemed confidential by LISC, whether disclosed to Consultant in writing or orally (collectively, "Confidential Information"). Confidential Information as used herein does not include information which: (i) is already known to Consultant at the time it is disclosed to Consultant; (ii) is already in possession of the public or becomes available to the public other than through the act or omission of Consultant; (iii) is acquired independently from a third party who is not under an obligation of confidentiality to LISC; or (iv) is required to be disclosed under applicable law or by a governmental order, decree, regulation or rule, provided that Consultant shall give written notice to LISC prior to such disclosure, affording LISC an opportunity to intervene and object, as may be appropriate and permissible.

Consultant agrees that, during and after the term of Consultant's relationship with LISC, Consultant shall hold the Confidential Information in strict confidence and will not use or disclose such Confidential Information, in whole or in part, to any person or entity (other than employees or agents of Consultant who must have such information for the performance of Consultant's obligations hereunder), unless such use or disclosure is specifically authorized by LISC in writing. Consultant shall be responsible for any use or disclosure of Confidential Information by any of its employees and/or agents and shall ensure that such employees and agents are subject to confidentiality obligations at least as restrictive as those hereunder.

5. Fee.

Fee to be paid and terms of payment are set forth in the consultant letters of appointment.

6. Services of Others.

LISC will not reimburse consultants for any payments made by them in obtaining the services (including secretarial) of other persons to assist them in their work for LISC unless stipulated in their letters of appointment. Reimbursement for services of other persons is claimed on an Expense Report form and supported by actual receipts.

7. Expenses.

LISC reimburses consultants for actual expenses incurred in connection with assignments, including reasonable living expenses if traveling at LISC expense. A single room with bath in a first-class hotel is considered adequate for all normal LISC business. The use of resort-type, luxury and other deluxe hotels is discouraged. Extraordinary expenditures such as computer time, reference books, special equipment, etc., must be stipulated in the consultant's consultancy agreement. Expenses are paid directly by a consultant and itemized daily on expense report forms. All original receipted hotel bills, transportation stubs (even if paid for by LISC) and original receipts for expenses must be attached to the Expense Report form. Only one original copy of an expense report is submitted for payment, and one copy should be retained by the consultant for tax purposes.

8. Travel; Tickets.

LISC reimburses the cost of transportation, usually air travel, for all individuals authorized to travel at LISC expense. The class of travel is determined on the basis of the least cost --



either tourist, excursion or economy -- most suited to the itinerary involved. Under no circumstances will LISC pay for first-class air travel. Consultants usually make their own travel arrangements and request reimbursement for travel cost on an Expense Report form. Consultants may use their personal automobile for LISC travel up to a 300-mile radius from their residences. Reimbursements may be claimed for (i) automobile travel at the prevailing IRS per-miles rate applicable as of the date of such travel, and (ii) tolls and parking charges.

9. Baggage Allowance.

Consultants are authorized the baggage allowance provided by domestic airlines.

10. Travel Insurance.

In the event that the consultant purchases airline tickets for LISC travel through Universal Travel Agency, Universal maintains \$200,000 in business travel insurance (for domestic consultants). This insurance is only in effect while the consultant is in travel status at LISC expense. Proceeds from a claim are payable to the estate of the consultant. Because this insurance is provided through Universal, LISC is not responsible in any way for the payment, or non-payment, of such insurance, and no claim may be made against LISC with respect to such insurance.

11. Taxes.

LISC reports all fees and expenses to the Internal Revenue Service as required by the Internal Revenue Code and to local and state taxing authorities, as applicable. LISC does not withhold Federal, state or local income tax or Social Security tax from fees paid to consultants except in cases where LISC is required to treat consultants as temporary employees because of the nature of their assignment. The withholding tax treatment of consultants' fees is set forth in the individual letters of appointment.

12. Modification of Specific Terms.

The specific terms of a consultant's individual consultancy agreement may be amended, extended or canceled only by mutual agreement in writing. Exception: The obligations of the consultant stated in paragraphs 2 and 3 above will survive the cancellation or expiration of the appointment.

13. Compliance with Governmental Requirements

By countersigning this Agreement and returning it to LISC, Consultant affirms that Consultant has complied with all federal, state and local laws, regulations and orders applicable to the conduct of its operations (including, without limitation, the activities contemplated by the Scope of Assignment under this Agreement). Further, by countersigning this Agreement, Consultant hereby agrees to continue to comply with all such requirements, as such may be amended from time to time.

A consultant appointment is in effect only after receipt by LISC of the countersigned copies of the consultancy agreement. Payment of fees and expenses by LISC to a consultant is made after receipt of these documents and the necessary payment forms.