



**Statewide State Employees Federated Appeal (SEFA)
Statewide Campaign Manager (SCM)
2021 Request for Applications**

ORGANIZATIONAL BACKGROUND

Under the authority of State Finance Law § 201-1 the Commissioner of the Office of General Services has adopted regulations to provide a uniform, effective and efficient policy for solicitation of charitable contributions. The SEFA regulations are published at 9 NYCRR Part 335.

The State Employees Federated Appeal (SEFA) is a legally sanctioned state employee payroll contribution program in New York State. . The Statewide SEFA Council was established in 2006 in the Title 9 NYCRR Part 335 regulation change. The SEFA Council is tasked with centralization of key services and the process, review, and ultimate decision with regard to newly applying charities and recertifying participant charities.

The SEFA Council provides oversight to the 13 local campaigns and the Committees that manage the local campaign and Federated Community Campaign Managers (FCCMs). The SEFA Council works closely with the Office of General Services, the State Comptroller's Office, the Attorney General's Charities Bureau, and the Governor's office to ensure that its decisions and work meet with state regulations and to ensure that its policies meet with technical and practical requirements for the flow of contributions.

The regulations specify core responsibilities for the SEFA Council and allow for the SEFA Council to make decisions and develop policy where needed. The regulations at 9 NYCRR 335.4 provide that the SEFA Council may retain a charitable organization that meets the state and federal regulations for nonprofit management in order to meet the requirements stated below.

STATEWIDE SEFA COUNCIL STATEMENT AND REQUIREMENTS

The Statewide SEFA Council is seeking a Federated Community Campaign Manager (FCCM) to oversee the New York State SEFA campaign for the years 2022, 2023 and 2024. The Statewide SEFA Council has focused on improving the accuracy of participant charity information, digitized forms, and established protocols designed to unify and centralize processes and practices.

The specific areas the SEFA Council wishes to focus on are:

- Maintenance of a Participant Charity Electronic Database,
- Continued improvement of participant registration and recertification processing,
- Development of a multi-year plan retaining retirees as contributors.
- Continued development of statewide marketing materials, pledge system, training and training materials, campaign reporting systems, database systems, Internet services, website development and website maintenance.
- Increasing in the amount of funds raised and total number of donors.
- The capacity to coordinate teleconferences and web based training.
- Recruitment of employee volunteers to support local committees and the Statewide Council

What Organizational Traits Are We Looking For in a FCCM?

- Experience
- The Ability to Tell a Story
- Willingness to ask for Money
- Passion for Our Mission
- A Successful Fundraising Record
- Professional Competency
- Vision for the Future

REQUEST FOR APPLICATION

The Statewide SEFA Council of the New York State Employees Federated Appeal (SEFA) seeks application from a federated community campaign or other charitable organization to provide centralized services and support the annual statewide SEFA solicitation campaign. The application is to cover an initial one year period (January 2022 through December, 2022) with two subsequent annual options to renew through December 31, 2024.

This RFA will be available on-line and in writing, upon request. A standalone companion document, the 2021 SEFA Federated Community Campaign Manager Application (the APPLICATION) will only be available upon written request to the Statewide SEFA Council Chairperson. Completed APPLICATIONS must be physically received by e-mail or hardcopy by the Chairperson **NO LATER THAN 6:00 P.M., July 15th, 2021.** Contact information is included at the end of this document.

Applicants must review and understand the SEFA regulations (9 NYCRR Part 335) and have expertise in the governance and administration of charitable organizations.

As outlined in NYCRR 335.4(b)(2): The federated community campaign or charitable organization retained by the Statewide SEFA Council shall:

- Prepare a plan for performing or supporting the Statewide SEFA Cabinet and Statewide SEFA Council over the next annual solicitation campaign term.
- Respond in a timely and appropriate manner to reasonable inquiries from participating organizations.
- Maintain Statewide Council records and bank accounts separate from the federated community campaign's internal organizational records and bank accounts.
- Prepare and file an annual financial report of the Statewide SEFA Council.

The Respondent shall also provide or have access to additional required services; i.e.

- Office space, office equipment, furniture, payroll services and benefits for the "SEFA Director".
- Storage space for hard copy files and other historical documentation which is the property of the SEFA Council.
- Internet and phone services.
- IT experience and resources for web page maintenance and development as well as maintenance and development of electronic databases for application, recertification and pledging
- Development and implementation of training for stakeholders (Federated Community Campaign Managers, SEFA Coordinators and others) as needed
- Availability of contract services including temporary staffing support
- Computer maintenance and repair services
- Postage, shipping and assistance with mailing services
- Printing and copying
- Conference and meeting facilities
- Legal services and legal counsel

The Respondent shall also work closely with the SEFA Council in supervising and directing the work of those who may be assigned to work under the agreement resulting from this solicitation.

FUTURE COUNCIL EXPECTATIONS OF THE FCCM:

- Clearly define and illustrate methods for keeping SEFA Council activities separate from those of responding organization's business activities.
- Propose a model and budget for services in response to the required deliverables.
- Prepare timelines for managing the SEFA campaign.
- Provide periodic "self-criticism" to the SEFA Council, which includes plans of corrective action to return to that which had been previously agreed upon.
- Produce an annual campaign financial activity report to the Attorney General's office in accordance with SEFA regulation 335.7(c)(5). "Prepare the financial report of the campaign. The financial report must include a calendar year cash reconciliation of opening cash balances, receipts, income, expenses, distributions to participants, and ending cash balances. The financial report is to be filed with the federated community campaign's annual filing required under Article 7-A of the Executive Law."

Responses to this "Request for Application" must satisfactorily address each section and question as presented in the Application. The respondents shall provide detailed statements as to how they will provide services including specific costs for services rendered.

RFA/APPLICATION EVALUATION CRITERIA:

Respondents will be evaluated based on the following criteria:

- Organization Size and Fundraising Success - 20% (application question #3)
- Technology/Electronic Database Delivery - 25% (application question #4)
- 2022-24 Fundraising Strategy - 25% (application question #5)
- Development of a 2022 Tactical Fundraising Calendar - 5% (application question #6)
- Strategy for attracting "Millennial" donors and soliciting and retaining retirees - 15% (application question #7)
- Budget - 10% (application question #8)

The SEFA Council, at its sole discretion, shall be the determiner, in all considerations whatsoever, for any responses to this RFA, and the SEFA Council's findings, conclusions, and determinations shall be final.

SEFA regulations are published as 9 NYCRR Part 335, and available at: [SEFA regulations](#).

Those requesting the APPLICATION and having questions regarding the RFA or the APPLICATION should contact the Chairperson of the Statewide SEFA Council:

Thomas Wickerham
SEFA Council Chair
105 Biondo Court
Rush, NY 14543
585-953-3331
sefacouncilchair@sefanys.org

Completed APPLICATIONS must be submitted to the above address or e-mail. Once again, the deadline for submission is 6:00 p.m. July 15th, 2021.