



## **REQUEST FOR PROPOSALS FOR FUNDRAISING SERVICES**

### **I. INTRODUCTION**

The Early Learning Coalition of Pinellas County, Inc. (Coalition) is a nonprofit organization that serves children in Pinellas County Florida. Established in May of 2000, the Coalition is a private, nonprofit corporation and has been determined to be exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. It is governed by a 29-member volunteer board of directors and its annual operating budget is approximately \$50 million. Administrative offices and all records are located at 2536 Countryside Blvd., Clearwater, FL 33763.

#### **1.1 Statement of Need**

The Early Learning Coalition of Pinellas has identified the need to increase and diversify funding as an organizational priority. Accordingly, the Coalition is seeking a professional fundraiser (individual or organization) to build the Coalition's capacity and success in fundraising. The Coalition is issuing this solicitation for obtaining consultation and assistance in executing a fund development strategy. The vendor will be evaluated and the best respondent will be awarded the contract. A failure to read, understand, or comply with the terms of this solicitation may result in Coalition's inability to accept or fully consider the response. Parties interested in responding to the solicitation should read the solicitation in its entirety before contacting the Coalition Contact Person for further information or submitting written inquiries.

#### **1.2 Statement of Purpose**

The objective of this RFP is to identify a consultant or firm to guide and assist in the development and execution of a fundraising strategy to garner required match funding and additional resources.

#### **1.3 Term of Contract and Renewal**

The anticipated initial term of the contract entered into with the successful vendor is 02.01.2019 and ending June 30, 2019, with renewal for a term not to exceed one (1) year.

Such renewals will be for twelve months in each fiscal year by mutual agreement and shall be contingent on satisfactory performance evaluations and availability of funds. Services included in the RFP may be amended, added to and/or deleted during the contract negotiations.

## II. RFP PROCESS

### 2.1 Contact Person

This RFP is issued by the Coalition. The single point of contact for e-mail communication regarding this RFP is [lcarson@elcpinellas.net](mailto:lcarson@elcpinellas.net)

The subject line of the email should be “RFP 181901 – Inquiries”.

### 2.1 Posting

All Official Notices, decisions and intended decisions and other matters relating to the procurement will be electronically posted on Coalition’s website:

### 2.2 Limitations on Contacting Personnel

All communications with Coalition employees as they relate to this RFP are prohibited during the time period in which the RFP is released and throughout the end of the 72-hour period following Coalition’s posting of the notice of intended award. The aforementioned 72-hour period excludes Saturdays, Sundays, and state holidays. Vendors may only communicate via electronic communications to the [lcarson@elcpinellas.net](mailto:lcarson@elcpinellas.net) or as provided in the solicitation documents. Violation of this provision may result in vendor being disqualified from this procurement.

### 2.3 Schedule of Events and Deadlines

Activity	Date	Address
RFP Advertised	December 3rd, 2018	
Written inquiries to be received	December 10th, 2018	
Coalition’s response to inquires	December 13th, 2018	

Sealed Proposal must be received	January 5th, 2019	
Opening of Proposals	January 5th, 2019	
Scoring by Advancement Committee	January 9th, 2019	
Final Award /Board	January 27th, 2019	
Posting of Notice of Intent to Award	January 28th, 2019	
Award of contract	February 1, 2019	
Effective Date of contract	February 1, 2019	

#### 2.4 Written Inquiries

Other than during the Vendor Solicitation Conference, prospective vendor questions will only be accepted if submitted as written inquiries via electronic mail, and received on or before the date and time specified in Section 2.3.

The emails must have in the subject "RFP 181901 – Inquiries". Faxes and US Mail inquiries are not acceptable.

#### 2.5 Response Deadline

Responses must be received by Coalition no later than the time, date and place as indicated in the proceeding deadline schedule. Any response submitted shall remain a valid offer for at least 90 days after the response submission date. No changes, modifications or additions to the response submitted (after the deadline for response opening has passed) will be accepted by the Coalition.

#### 2.6 Receipt Statement

Responses not received at either the specified place, or by the specified date and time, will be rejected and returned unopened to the vendor by Coalition.

#### 2.7 Notice of Contract Award

The Coalition intends to award the contract to the responsive vendor that the evaluation team determines, based on the selection criteria set by the Coalition.

## 2.8 Evaluation and Scoring

All accepted proposals will be reviewed by the Selection Committee and will be evaluated and scored using the following criteria:

- Qualifications and previous work of consultant (25 points)
- Demonstrated ability of consultant to carry out fundraising plan of similar character and size (25 points)
- Understanding of project goals, local issues, and community fundraising assets and opportunities. (20 points)
- Cost effectiveness. (15 points)
- Responsiveness to submission requirements (15 points)

## 2.9 Scope of Work

The Coalition is seeking a Fundraising Consultant with a proven track record for creative excellence in developing fundraising plans and developing organizations' fundraising capacity.

The consultant's responsibilities will include both immediate task-oriented work along with big-picture thinking/planning:

1. Assess the Coalition's current fundraising program, board and staff expectations, current capacity and environmental context for fundraising utilizing past documents and plans and limited interviews.
  1. Identify strengths and weaknesses of existing fundraising efforts and infrastructure to determine areas for improvement and development.
  2. Assess the opportunities and threats external to the organization as well as the agency readiness that will inform the fundraising plan to ensure its success.
2. Develop a multi-year fund development plan and implementation strategy to build a fundraising program that generates \$150,000 - \$300,000 annually in unrestricted revenue and is reflective of and in alignment with the Coalition's mission/vision/values and capacity to execute and sustain.
3. Develop a comprehensive fundraising plan with strategies to increase the Coalition's fundraising efforts from (i) individuals (ii) corporations and (ii) special events
4. Recommend key components and tactics for 2018 implementation including possible donor circle. At a minimum, we expect this to include:
  - a calendar (when to send which type of appeals and to whom),
  - advise on best practices with re-solicitation, donor tracking, lapsed donors, etc.
  - specific efforts to leverage existing donors and cultivate new donors
  - best practices around list acquisition,
  - guidance on greater expansion into digital fundraising.

5. Initiate the implementation stage in conjunction with the CEO for an agreed upon time following the completion of the plan.
  1. Identify 10 new, vetted, high-potential donors.
  2. Test out strategy with at least 4 high potential donors
  3. Provide training and guidance to board members and senior management staff on how to implement the fundraising plan.
  4. Recommend a potential course of action to identify resources and establish roles to meet the fundraising strategies outlined in the plan.
6. Provide and present the fundraising plan to the Advancement Committee and later to the board at the Coalition's March 29th, 2019 board meeting.

## 2.10 Staffing

Describe what your organization will do to ensure your team is properly staffed at the time services begin. Please note any exceptions or challenges to meeting the staffing qualification requirements you anticipate etc.

## 2.11 Invoicing and Payment of Invoices

The vendor shall request an electronic payment for services delivered on a monthly basis through AP inbox the by the 10<sup>th</sup> of each month. Payment will be released once all data has been validated at 100%.

## 2.12 Contract Amount

The amount of the contract resulting from this RFP is not to exceed \$50,000 per year (subject to the availability of funds). Any renewal shall be in writing and shall be subject to the same terms and conditions as set forth in the initial contract.

## 2.13 Cost of Preparation of Proposal

The Coalition is not liable for any costs incurred by a vendor responding to this RFP.

## 2.14 How to Submit a Proposal

- Proposals must be submitted by 4:00PM on January 5th, 2019. Proposals not meeting the criteria outlined in the RFP will not be considered.
- All Proposals should be submitted electronically either in PDF format or Microsoft Word. Email to lcarson@elcpinellas.net.

## 2.15 Required Content of the Response

All proposals must include:

- Proposals have a 10-page maximum. The font should be Arial, Times New Roman or Corbel, 12-point font size, and at least 1.15 spaced lines.

- A cover letter to the attention of Lindsay Carson, CEO.
- A narrative that addresses how the Scope of Work, as outlined above, will be accomplished, including a timeline with benchmarks and the number of hours required to accomplish the plan.
- Proposal must include a communication plan with benchmarks.
- Proposals must speak to the qualifications of the consultant as outlined below in the Evaluation Criteria and include the resume of the principal resource development professional providing direct service for this project.
- Proposals should clearly demonstrate that the consultant has familiarity/knowledge of local, national and even international politics, particularly independent, left politics.
- Proposals must clearly outline the responsibilities of both the Coalition and the selected individual or firm.
- Project budget as well as all costs payable by the Coalition must be clearly defined. All billing expectations are also to be addressed and please note that billing will coincide with reaching set goals and/or milestones.
- A minimum of three (3) references from clients where the bidder has successfully performed similar services.

Those responding to this RFP must follow its procedures and requirements. Failure to comply with or complete any part of this RFP may result in rejection of the proposal.