



## Strategic Plan Fundraising Consultant RFP

## **THE NORTH BROAD RENAISSANCE:**

The creation of the North Broad Renaissance (NBR) was born out of a concern and desire of Council President Darrell Clarke to give more attention and support to North Broad Street. Specifically, there was a great need to support and oversee the community revitalization along the North Broad corridor. As a result, the organization was created and is now organized as a voluntary special service district for this particular section of the city.

The NBR is a federal and state approved 501(c)3 organization located in Philadelphia, PA that was founded in 2015 in order to address the needs of the community of North Broad Street. The area that the organization covers is on North Broad Street from Germantown Avenue to City Hall.

In partnership with community stakeholders, NBR is planning to revitalize the community, create opportunities, and improve the economic power and overall quality of life along one of Philadelphia's most prominent corridors - North Broad Street.

## **SECTION 1: PURPOSE**

The NBR is requesting submissions from fundraising consultants interested in managing a capital campaign to raise the money needed to accomplish the goals established in the [2020 Vision \(the organization's 5-year strategic plan\)](#). In addition to the current funding the organization receives, North Broad Renaissance's fund raising goal over the next four years is to raise \$1.75 million.

The purpose of this Request for Proposal is to retain a fundraising consultant who will:

1. Work with the Executive Director to design a campaign plan
2. Manage the implementation and launch of the campaign
3. Track progress and ensure the campaign remains a priority for the organization
4. Identify a donor base
5. Provide progress reports and modifications to the campaign as needed to maximize results.

## **SECTION 2: PROJECT**

The goals of the capital campaign are to reach out, on a local and national basis, to find and secure additional donors and to reinvigorate existing donors in order to accomplish the goals established in the 2020 Vision.

The total amount budgeted for this campaign is \$45,000.

The campaign can be terminated by either party upon at least thirty (30) days' written notice, or may be terminated immediately by the NBR if any of the requirements set forth in the agreed upon campaign agreement are not timely met or if the campaign "message" is not followed by the consultant.

The NBR envisions the completion and success of the capital campaign in the following phases (please ensure that all necessary components are accounted for and feel free to modify timelines and/or add additional phases based on your experience):

**PHASE 1 - Campaign Assessment and Plan - September 12, 2016 through September 30, 2016**

- Refine internal capacity and needs including staff and volunteer requirements for the campaign.
- Develop campaign plan and calendar.
- Development of a case statement.
- Grant writing and outreach to foundations and state funding sources.

**PHASE 2 - Campaign Implementation and Launch – to begin October 1, 2016 to October 31, 2016.**

- Collaborate with website developer to ensure capital campaign is included in website.
- Identify donors, create individual donor packet.
- Work with the Executive Director to secure donor meetings.
- Set goals (gift charts) and develop fundraising strategy and timing.
- Donor stewardship and cultivation.
- Capital campaign relationship with major donors.
- Develop campaign events.
- Donor recognition and naming opportunities
- Assist with proposals to national foundations and corporations.
- Develop public financing options (federal, state, local).

**PHASE 3 - Campaign Management - projected to take approximately 6 months (the Executive Director will perform an evaluation at 3 month intervals to measure the success of the campaign, and may terminate the campaign for inability to reach goals)**

- Focus on active cultivation and solicitation of major gift prospects.
- Ensure that the public information and public relations campaign is being managed accordingly.

- The NBR shall be solely responsible for compliance with IRS charity donation acknowledgement letters for all donations received, but the acknowledgement letters will be based solely on the consultant's reports of donations.

#### **SECTION 4: QUESTIONS**

All questions pertaining to this proposal are preferred in writing and sent by email to Shalimar Thomas(sthomas@northbroad.org) no later than August 19, 2016. After this date, no further inquiries, concerns, or questions may be submitted. Questions will be answered by August 22, 2016 at the latest to allow for timely submissions of RFPs.

#### **SECTION 5: SCHEDULE AND TIMING**

The NBR is considering the following timeline for launching the campaign. As part of your response to the RFP, please include feedback on feasibility of the proposed timeline:

- August 8, 2016: RFP issued.
- August 19: RFP questions which were submitted on or prior to August 4, 2011 will be answered.
- August 26, 2016: Proposals due.
- August 29, 2016: Finalists selected and notified.
- September 6, 2016: Finalist presentations to the NBR.
- September 9, 2016: Presenters notified of decision by telephone.
- September 12, 2016: Campaign planning with NBR begins.
- September 26, 2016: Approval by the Executive Director for capital campaign.
- October 1, 2016: Campaign launch.

#### **SECTION 6: PROPOSAL FORMAT AND REQUIREMENTS**

Please address the following topics/questions. Please feel free to submit additional information.

##### Background

- Services you have previously provided relative to a capital campaign.
- Experience with similar projects (national vs. regional or local, type of organization, size of community, etc.).

##### Administration, Organization, Pricing, and Staffing

- Describe your campaign process. What distinguishes your processes and approach from those of others?
- Provide a proposed implementation schedule.
- What information and recommendations will be included in the campaign plan?
- A list of anticipated reimbursable expenses and the rate charged for each.

- Any other additional fees or charges.
- What are your expectations of the NBR during the campaign process? Provide information regarding the resources and involvement that you will require from us.
- Can you provide educational experiences for any of our students (as volunteers)?
- Provide any other services that may be considered as an added value.

#### Track Record and References

- Please provide us with a client list within the past five years.
- Are you presently doing any work nationally for nonprofit educational entities? If so, for who and where? What makes you the “right fit” for us? What sets you apart from other candidates?
- Provide information regarding your knowledge of/experience with non-profits, and voluntary special service districts.
- Please provide us with three client references we can contact including name, title, organization and telephone number.
- Provide a sample of previous work related to carrying out a capital campaign – marketing materials, grant proposals, websites, photos of donor parties, etc.

#### Staff Development

- If we retained you for the campaign, would you be willing to offer our staff your advice and assistance with other fundraising activities?
- What additional fees would be required?
- What are your expectations of the NBR’s staff during the process?

#### **Disclaimer**

In its sole discretion, the North Broad Renaissance (NBR) reserves the right to (1) withdraw this RFP without notice, (2) accept or reject any or all proposals; and (3) accept proposals which deviate from the RFP as the NBR deems appropriate and in its best interest. The information in this RFP is for guidance only, and does not constitute any part or all of an agreement. The NBR reserves the right to negotiate with any, all or none of the applicants responding to the RFP. Following submission of a proposal, the applicant agrees to deliver such further details, information, and assurances, relating to the purpose and the applicant including the applicant’s affiliates, officers, directors, partners and employees as requested by the NBR in its discretion. Any and all costs and expenses associated with the preparation of any report or statement in response to the RFP shall be borne by the applicant. Neither the NBR nor its board members shall have any obligation or liability with respect to this RFP and this selection and award process or whether any award will be made. Any recipient of this RFP who responds hereto fully acknowledges all the provisions of this disclaimer and agrees to be bound by the terms hereof. Contractor should have no pending lawsuits against the City and tax compliance should be submitted.