

# **Request for Proposal**

## **AFP-NNE 2017 Annual Conference Academy**

### **Summary and Background**

The Association of Fundraising Professionals of Northern New England (AFP-NNE) is currently accepting proposals to design, develop and present a day-long “Academy” to fundraising professionals and others attending the first day (11/1/17) of AFP-NNE’s 3-day Annual Conference and Academy, November 1-3, 2017, at the Grappone Convention Center, Concord, NH.

The focus of this year’s Academy is learning to fundraise effectively as a “lone ranger.” Many non-profits in northern New England are constrained by resources, employing 0 – 2 paid development staff. As such, the critical responsibility for raising monies to fund organizational mission falls to one or more individuals, often the CEO alone, who may not have significant fundraising experience or expertise. This year’s Academy will focus on providing essential knowledge and teaching best practices to those working in small development shop environments.

The Association of Fundraising Professionals represents more than 33,000 members in 230 chapters throughout the world, working to advance philanthropy through advocacy, research, education and certification programs. The Association fosters the development and growth of fundraising professionals and promotes high ethical standards in the fundraising profession. AFP-NNE represents fundraising professionals in the three northern New England states of New Hampshire, Vermont and Maine.

### **Proposal Guidelines**

This Request for Proposal represents the requirements for an open and competitive process. Proposals will be accepted until 5pm EST June 30, 2017. All proposals must be signed by an official agent or representative of the company submitting the proposal.

If the organization submitting a proposal must outsource or contract any work to meet the requirements of contained herein, this must be clearly stated in the proposal. All costs included in proposals must include any outsourced or contracted work, and must include a name and description of the organizations being contracted.

All costs must be itemized to include an explanation of all fees and costs.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP. All contractual terms and conditions will be subject to review by AFP-NNE’s legal representative.

## **Project Purpose and Description**

The purpose of this project is as follows:

We intend to provide AFP-NNE members, and other attendees of the 2017 Annual Conference, with the skills and expertise necessary to effectively fundraise in a small development shop setting. In this context, “small development shop” refers to organizations varying in size from one individual (the CEO) to those that employ up to two development staff. Attendees should come away with a general understanding of how to fundraise effectively as a “lone ranger”, as well as with tips for locating additional help, both from peers and other resources.

Project Description:

To realize the purpose outlined above, AFP-NNE is seeking an experienced organization to design, develop and present a day-long seminar to approximately 30-50 Academy attendees on November 1, 2017, the first day of AFP-NNE’s 2017 Annual Conference. The Conference will be held at the Grappone Convention Center in Concord, New Hampshire.

The day-long Academy will begin at approximately 8:30am, break for lunch at noon, and conclude about 4:30pm.

Academy attendees are expected to include those with a range of skills and experience, typically beginner to intermediate-level understanding of fundraising methods and best practices.

## **Project Scope**

Topics to be covered during the day-long Academy should include, but are not necessarily limited to:

- Creating a development plan
- Budgeting
- Working effectively with executive staff, board members and other volunteers
- Prioritizing and managing special events
- Effectively communicating with donors/members/constituents
- Annual Giving
- Major Gifts, including “moves management” and “making the ask”
- Planned Gifts, especially those appropriate for small shops
- Stewarding donors
- Database management
- Measuring and reporting fundraising results
- Enlisting outside help (volunteers, vendors, etc.)
- Best practices

It is expected that the Academy presenters will provide attendees with written materials as appropriate, as well as online resources, for follow-up study and reference.

## **Request for Proposal and Project Timeline**

Request for Proposal Timeline:

All proposals in response to this RFP are due no later than 5pm on June 30, 2017.

Evaluation of proposals will be conducted from July 1 until July 21, 2017. If additional information or discussions are needed with any bidders during this two-week window, the bidders will be notified.

The selection decision for the winning bidder will be made no later than July 30, 2017.

Upon notification, contract negotiations with the winning bidder will begin immediately. Contract negotiations will be completed by July 14, 2017.

Notifications to bidders who were not selected will be completed by August 7, 2017.

Project Timeline:

The winning bidder will present a day-long Academy to attendees on November 1, 2017.

## **Budget**

All proposals must include the proposed cost to complete the tasks described in the project scope, including both preparation for, and delivery of, the Academy on November 1, 2017. Total cost should not exceed \$5,000.

## **Bidder Qualifications**

Bidders should provide the following items as part of their proposal for consideration:

- Description of experience in planning and presenting fundraising seminars
- List of how many fulltime, part time and contractor staff in your organization
- Examples of three or more seminars developed and presented by your organization
- Testimonials from past clients on fundraising seminars delivered
- Anticipated resources you will assign to this project (number, role, title, experience)
- Project methodology

## **Proposal Evaluation Criteria**

AFP-NNE will evaluate all proposals based on the following criteria. To ensure consideration for this Request for Proposal, your proposal should be complete and include the following criteria:

- Overall proposal suitability: seminar description must meet the scope and needs included herein and presented in a clear and organized manner
- Organizational Experience: Bidders will be evaluated on their experience as it pertains to the scope of this project
- Previous work: Bidders will be evaluated on examples of their work pertaining to seminars of this type, as well as client testimonials and references
- Value and cost: Bidders will be evaluated on the cost of their solution based on the seminar to be executed in accordance with the scope of this project
- Technical Expertise and experience: Bidders must provide descriptions and documentation of staff fundraising expertise and experience

Each bidder must submit their proposal via email to the address below by June 16, 2017 at 5pm EST:

AFP-NNE 2017 Conference Planning Committee

[admin@afp-nne.org](mailto:admin@afp-nne.org)