



NATIONAL CENTER FOR  
**FAMILY PHILANTHROPY**

*Inspiring Generations of Giving*

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Request for Proposals: Marketing and Communications Strategy

Proposal Deadline: Thursday, June 15, 2017

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National Center for Family Philanthropy  
1667 K Street, NW Suite 550  
Washington, DC 20006



## Introduction

Family philanthropy is growing — and evolving — quickly.

Between 2002 and 2013, the number of U.S. family foundations grew by 44 percent — increasing from 29,400 to 42,300. During that same time, total annual giving by family foundations has almost doubled to \$23.9 billion.

The National Center for Family Philanthropy works to serve these vital institutions – as well as the growing number of families who give via donor advised funds, giving circles, supporting organizations, and other vehicles – by providing resources, advice, research, and convenings that help family philanthropies operate effectively and have greater impact with their giving.

But as NCFP celebrates its 20th anniversary, it recognizes that it is only reaching a small portion of this exploding field and believes that it can serve giving families much more effectively if it takes steps to more aggressively market its resources and expertise.

That's where you come in.

NCFP is seeking proposals from marketing and communications firms to develop a comprehensive, achievable strategy for reaching and engaging with our growing market.

Over the past two years, we've taken steps to improve our tactical approach to communications and marketing — stepping up our game in areas such as email, social media, and content marketing and becoming much more deliberate in our messaging.

Now, we're seeking a partner to help us develop a communications and marketing strategy that will take our tactical know-how to the next level. We're searching for a firm that can:

- Conduct an environmental scan of the family foundations market;
- Assess our current communications and marketing work;
- Establish aggressive yet achievable goals for expanding our reach and elevating our fundraising and develop a system for measuring progress toward those goals;
- Define how we can more effectively reach our key audiences to achieve those goals;
- Develop a comprehensive communications and marketing strategy that will help us reach a much larger slice of the family foundations market.
- Empower NCFP to execute on this strategy to achieve its desired outcomes.

The National Center for Family Philanthropy is looking to begin this work in August 2017 and partner with the winning firm to develop this strategy before March 31, 2018.



## **About The National Center for Family Philanthropy**

The National Center for Family Philanthropy is the only national nonprofit dedicated exclusively to families who give and those who work with them. We provide research, expertise, and learning opportunities to inspire our national network of giving families every step of the way on their philanthropic journey. Families learn how to transform their values into effective giving to achieve positive and enduring impact on the communities they serve. Learn more at <http://www.ncfp.org>.

## **Key Outcomes**

The National Center for Family Philanthropy is seeking a firm that can develop a strategic marketing and communications plan for our programs that help us achieve two primary goals:

- Establishing NCFP as the preeminent resource for those who are looking to learn about family philanthropy and best practices in family philanthropy
- Leveraging our 20th anniversary and resources such as *The Trends in Family Philanthropy Survey*, *Generations Together*, and *Splendid Legacy 2: Creating and Re-Creating Your Family Foundation* to expand our network of supporters and partners

## **As a result of this process, we will:**

- Develop a clear branding approach for our programs and activities.
- Understand the participant, partner, and funder audiences for our programs and activities and optimal channels and methods to reach and engage these audiences.
- Have clear recommendations to expand our marketing reach and improve our digital and direct-marketing presence, including potential options to improve our website, e-mail marketing activities, social media, and paid advertising.
- Have a marketing and communications plan to execute in 2018-2020 to support organization and program branding.
- Have the tools and training needed to deliver on this plan.
- Double the number of family foundations that annually engage with NCFP through our marketing channels, resources, and events - and double the number of new Friends of the Family supporters by the end of 2020.



## **Required Proposal Elements**

Proposals should be limited to no more than 15 pages (8 ½ x 11), with the exception of appendices.

Please provide the following information in your response:

### **Agency Overview**

- Briefly describe your agency/firm's capacity to complete our project.
- Briefly outline your firm's experience developing communications and marketing strategies, its experience working with philanthropic organizations, and understanding of the family foundation market.

### **Proposal Details**

- Detail how your firm would approach the project.
- Provide a proposed Scope of Work and deliverables for completion of the project.
- Provide a proposed timeline for completion of the project.
- Provide an itemized budget and budget narrative.
- Identify any services that would be subcontracted, with the specific responsibilities and a brief background of the subcontractor.

### **References**

- Provide current reference information including current names and phone numbers/email addresses for three current or former clients.

### **Required Appendices**

- Include the names and resumes or bios of all individuals who would directly work on this project and outline each person's role.

### **Optional appendices (not subject to the 15-page limit):**

- Examples of communications and marketing strategy work conducted by your firm.
- Other examples of your work that are relevant to this project.



## About You

We are looking for communications and marketing companies that have the following characteristics:

- Proficiency in developing and managing integrated communications and marketing strategies, with a particular expertise in digital marketing and communications tools (including social media). The tools we leverage at NCFP include Salesforce; Act-On, Google AdWords Grants, GuideStar Pro.
- Proven expertise in conducting large-scale environmental scans of markets for corporate or nonprofit clients, coupled with demonstrated success in helping those clients to penetrate those markets successfully.
- Proven ability to translate market research into actionable strategies. We're not looking for research for the sake of research. We want it to inform a strategy that will help us achieve tangible results.
- Proven ability to deliver results within the resource constraints of an organization that does not have full-time communications staff.
- Ability to meet aggressive timelines and efficiently manage multiple approvers in order to stay on track.
- Previous experience working with philanthropic support organizations and/or ultra high net worth markets is a plus.
- Experience with or networks in family philanthropy, family offices, and wealth planning is a plus.



## Selection Process Schedule

<b>Task</b>	<b>Deadline</b>
<b>RFP Sent</b>	May 4, 2017
<b>Deadline for Proposals</b>	June 15, 2017 - 5 p.m. ET
<b>Interviews with Finalists</b>	June-July 2017
<b>Award Decision</b>	Late July 2017
<b>Project Start Date</b>	August 1, 2017
<b>Delivery of initial findings</b>	December 15, 2018
<b>Presentation of draft recommendations &amp; strategy</b>	February 15, 2018
<b>Approval of recommendations &amp; strategy</b>	March 15, 2018
<b>Project End Date</b>	March 31, 2018



## Evaluation Criteria

- **Experience:** The firm has a track record of high-quality communications and marketing strategy development and execution as evidenced by samples included in the proposal.
- **Understanding the Client and its Audiences:** The firm has demonstrated an understanding of the family philanthropy market, and NCFP's place in that market, enough to establish confidence that marketing and communications goals can be met.
- **Suitability of the Proposal:** The proposed solution meets the needs and criteria set forth in the RFP and providing a clear plan of work.
- **Expertise:** The firm demonstrates expertise in conducting the work required as evidenced by the proposal, references, and proposed project team.
- **Examples:** The firm demonstrates successful completion of similar projects and demonstration of the qualifications necessary to undertake this project.
- **Budget:** The proposed budget is consistent with the value offered by the agency/firm.
- **Presentation:** Information is presented in a clear, logical, well-organized manner.



## **Additional Requirements**

- Each bidder shall bear its own costs and expenses incurred in preparing and submitting the bid. It should be understood and agreed that the National Center for Family Philanthropy accepts no responsibility for any costs and expenses incurred by bidders in preparing and submitting such bids.
- The price you quote should be all-inclusive. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees.
- It is understood that the aforementioned specifications are preliminary and subject to change at the discretion of the National Center for Family Philanthropy, the client. It is understood that meetings will need to be held with Bidder and Client groups to refine requirements for specific work plans.
- Bidder is required to bid on the requirements as detailed in this RFP. However, if it wishes, Bidder is encouraged to offer technologies and solutions beyond those specified here.
- All final materials, ideas, designs, code, artwork, and products created or developed during work on this project are the sole property of the National Center for Family Foundation. It is agreed that the National Center for Family Philanthropy will hold the copyright and source materials for any and all work related to this project.
- All materials will be delivered to the National Center for Family Philanthropy's contact person at each major milestone in the schedule, in an electronic format.
- Award shall be made in accordance with the best interests of the National Center for Family Philanthropy, which in most cases shall be deemed to be the most responsible bidder that meets or exceeds specifications. The bidder understands that written notice of award will constitute acceptance of the bid offer, subject to such changes as may have been negotiated.

## **Contact Information for Questions**

Please direct questions related to this proposal to **Kirkland Hamill** via email: [kirkland@ncfp.org](mailto:kirkland@ncfp.org).

Questions will be fielded up until the RFP due date. Please do not contact any other members of NCFP's staff or board with questions unless directed.

## **Deadline for submissions**

**All responses are due by 5:00 PM (EST) on Thursday, June 15, 2017.**