

## **U.S. CHESS FEDERATION DEVELOPMENT - REQUEST FOR PROPOSALS**

The U.S. Chess Federation seeks proposals from qualified fundraising consultants to conduct a feasibility study and to design a recommended annual development campaign. The study should both determine how much capital the USCF can realistically raise and in what duration of time and recommend a plan to carry out the campaign. Additionally, should the project move forward after the initial phase, the consultant would be expected to develop a plan outlining the cost of providing ongoing development assistance.

### **USCF PROFILE**

The United States Chess Federation (USCF) is the official, not-for-profit 501(c)(3) US membership organization for chess players and chess supporters. Its mission is to empower people through chess one move at a time. Its vision is to enrich the lives of all persons and communities through increasing the play, study, and appreciation of the game of chess.

The USCF is a member-based organization that currently numbers over 80,000 members. For over 75 years, the USCF has represented players of all strengths and abilities in the World Chess Federation. The USCF sanctions thousands of tournaments, including 25 National Championships, and rates over half a million officially rated games annually.

Founded originally in 1939 as a 501(c)(4) organization, the USCF received its status as a 501(c)(3) organization on March 28, 2014.

### **SCOPE**

In light of its new status as a 501(c)(3) charitable organization, the USCF seeks to engage a fund development contractor or consultant to initiate a plan for its fundraising and development efforts, and, if requested, provide additional subject matter support.

As the first component of this effort, the USCF is seeking a consultant to conduct a feasibility study to determine the amount of capital that could reasonably be raised from private-sector donors, philanthropic individuals, and foundations. The consultant, in coordination with the USCF staff and Executive Board would:

- Conduct a feasibility study.
- Provide a methodology and quantify likely donor support for USCF activities.
- Identify a donor list comprised of philanthropic donors and foundation prospects.
- Recommend campaign strategies for reaching new and diverse audiences and donors.
- Offer staff and Executive board training in capital campaign solicitation.

It is the objective of the USCF to conduct a feasibility study outlining the USCF's short- and long-term philanthropic goals and long-term opportunities for financial success.

In addition, the proposer should provide a recommended structure for conducting a campaign, including fundraising and communications strategies, methods of contact, a timeline for completion of a campaign, and necessary USCF resources to successfully conduct a campaign.

## **DELIVERABLES**

- **Feasibility study.** Establish foundation of assets, challenges, opportunities and threats related to campaign, based on:
  - Stakeholder research and interviews
  - Materials review
  - Infrastructure audit
  - Peer competitor review/environmental scan

This study should also provide a methodology and a quantitative assessment of the likely outcomes of a successful campaign.

- **Case for Support.** Develop foundational document and appropriate supporting documents to guide philanthropic strategy for campaign.
- **Donor Prospect List, Volunteer Leadership Prospect List, Top Prospects for Both.** Identify most promising prospects for capital campaign donors and volunteer leadership.
- **Fundraising Plan.** Develop a comprehensive fundraising plan that includes goals, milestones, cultivation and solicitation strategies and supporting tactics, specifications for campaign tools, budget and timeline, and evaluation methods.

## **REQUIREMENTS**

The firm should be able to perform the following functions:

- **Test basic planning assumptions with potential donors.** Determine how potential donors feel about the USCF.
- **Expand potential prospect list.** Develop the optimal funding mix of lead donors, major donors, private foundations, and, if necessary, direct-mail public solicitations.
- **Determine fundraising strategies and identify USCF's strengths, weaknesses, and prognosis for success/inability to reach recommended goal.**
- **Develop a fundraising plan for soliciting individual prospects.** Information developed in the confidential interviews with the consultant will be used to develop an appropriate solicitation plan, giving level(s) and fundraising schedule (including potential in-kind gifts).
- **Prepare written report/fundraising plan.** The completion of the feasibility study will be a written report that synthesizes the findings from the interviews, and the consultant's recommendations for conducting a successful capital campaign.

## **PROPOSAL FORMAT**

Proposal should be arranged as follows:

- Title page.
- Letter of Introduction introducing the company and signed by person authorized to sign on behalf of, and bind the company to, statements made in response to the RFP.
- Project Approach including significant phases and deliverables.
- Project timeline.
- Estimate of fees and expenses for feasibility study.
- Estimate of fees and expenses for ongoing assistance, should your firm be awarded the feasibility study project.
- Firm capabilities:
  - experience with similar organizations and capital campaign projects
  - experience with feasibility studies and fundraising plans
- Project team: Biographies or resumes detailing experience with similar projects, raising private funds.
- References: Complete contact information of three references from similar types of projects conducted in the past 3-5 years.

## **Evaluation Requirements**

- Quality and completeness of understanding, approach and overall proposal
- Quality of match between qualifications/capabilities and experience, project scope and requirements
- Expertise of project team
- References
- Value/Budget

## **Estimated Schedule**

- Issue Request for Proposals.....April 3, 2015
- Written questions submitted.....April 10, 2015 5 pm CDT.
- Written responses posted.....April 17, 2015
- Proposals due.....May 1, 2015
- Announce decision and send notification.....May 22, 2015
- Begin work.....June 15, 2015

**Questions/Clarifications** Contact Jean Hoffman at [jean.hoffman@uschess.org](mailto:jean.hoffman@uschess.org).

**Proposal Submissions** Proposals are due no later than **5:00 pm on May 1, 2015**. Hard copy or electronic copy is acceptable. Please send electronic copies directly to [jmisner@uschess.org](mailto:jmisner@uschess.org).