



REQUEST FOR PROPOSAL

Fundraising and Marketing
Consulting Services for the
Napa Valley Education Foundation

Applications must be received no later than 5:00 PM, January 30, 2009.

**Napa Education Foundation
Attention: Selection Committee Chair
2425 Jefferson Street
Napa, CA 94558
foundation@nvusd.k12.ca.us**

Table of Contents

<u>Section</u>	<u>Content</u>	<u>Page</u>
One	Introduction	3
Two	Proposal Schedule	4
Three	Proposal Requirements	5
Four	Proposal Format and Content	6
Five	Scope of Work	9
Six	Proposal Evaluation and Award	13

Section 1 - Introduction

1. Statement of Purpose

The purpose of this Request for Proposal (RFP) is to obtain as complete data as possible from each prospective company or individual to enable the Napa Valley Education Foundation (Foundation) to determine which, if any, is best able to serve the defined goals and objective of the Foundation.

It is the intention of the Foundation to select a consultant with experience and ability to provide the Napa Valley Education Foundation (Foundation) with consulting services with an emphasis on fundraising and marketing to develop gifts from charitable foundations and family funds as part of a key strategic goal to expand the Foundation.

2. Contract Duration

The Foundation intends to enter into one or more agreements for Fundraising and Marketing Consulting Services on March 1, 2009 through September 1, 2009.

3. Description of the Napa Valley Education Foundation

The Napa Valley Unified Education Foundation was formed in 1983 by community leaders to assist in funding K-12 public education. The goals of the original NVUEF were:

- To enrich school programs
- To fund innovative educational techniques
- To maintain educational excellence by means of fundraising activities

NVUEF changed its name to the Napa Valley Education Foundation in 2007, twenty-five years after its creation. The NVEF believes that our children are a community treasure, and has a vision to inspire children to reach their full potential by funding arts education and other vital programs. This vision is in alignment with the vision of the Napa Valley Unified School District: "Transforming lives by instilling 21st century skills and inspiring lifelong learning in every student." NVEF supports quality educational programs in the arts and other areas for each child in the Napa Valley Unified School District. As concerned citizens, committed parents and advocates for educational excellence, we raise funds, gather resources and act to involve the community in supporting public education. We celebrate the importance, value, and achievement of our students, teachers and schools. We support the healthy development of all students enrolled in the Napa Valley Unified School District by enriching school programs and fostering community support of educational excellence.

Section 2 - Proposal Schedule

The following Proposal Schedule represents the Foundation's best estimate of the schedule that shall be followed for the Request for Proposal process.

Foundation reserves the right to adjust this schedule as it deems necessary. Notification of adjustments to the Proposal Schedule will be made available on the Foundation's website: www.nvef.org.

<u>Event</u>	<u>Date</u>
Public Release of RFP	1/21/09
Deadline for Submission of RFP Proposals	1/30/09
Proposal Review by Foundation Selection Committee	1/31/09-2/2/09
Board of Directions Review of Finalists	2/3/09
Foundation Selection and Award	TBD
Foundation Issues Award Letter	TBD
Execution of Agreements	TBD

Section 3 - Proposal Requirements

The following requirements will apply to all RFPs submitted to Foundation for consideration:

1. Proposals should be compatible with the Foundation's vision and mission for the students of Napa Valley Unified School District.
2. Proposal received after **5:00PM (PST) on January 30, 2009** will not be considered.
3. Proposals must be submitted via email. Addresses as are follows:
Napa Education Foundation
Attention: Selection Committee Chair
2425 Jefferson Street
Napa, CA 94558
foundation@nvusd.k12.ca.us
4. No exceptions or extensions will be granted for delivery failures of any sort. Foundation assumes no liability for transmission or delivery failures.
5. Facsimile copies are not acceptable in response to this RFP.
6. Your proposal will become part of the contract if your proposal is selected for award. Price quotations and other time dependent information contained in your proposal shall remain firm for a minimum of 90 days from the proposal submission deadline.
7. All costs associated with the development and presentation of the proposal will be at the sole expense of the Proposer and will not be reimbursed by the Foundation.
8. Proposals, and all supporting documentation, will become the property of the Foundation and will not be returned. Foundation reserves the right to copy the material for evaluation and informational purposes.
9. Any questions or concerns regarding this RFP, or inquiries regarding the RFP process and proposal submission, must be in writing and must be submitted via email no later than 5:00PM (PST) on January 30, 2009.
10. Finalists may be asked to present their proposal in person.
11. Finalists may be required to undergo a background check and/or livescan evaluation.
12. Foundation reserves the right to reject any and all proposals and to waive any irregularity therein.
13. Foundation is under no obligation to award this contract to the proposal that reflects the lowest cost.

Section 4 - Proposal Format and Contents

Proposers should address the content sections presented below in narrative format. Information should be as concise and direct as possible. Any supporting documentation submitted in conjunction with the proposal should be directly related to one or more of the content sections.

1. Required Proposal Format

The Bidder should follow the general guidelines below in developing and submitting the proposal:

- Submit one copy of the proposal;
- Limit proposal to ten pages (not including attachments);
- Use 1.5 line spacing, 1 inch margins and 12_point font size; and
- Must be received no later than 5:00 PM on the date and at the email address noted on the front of this Request for Proposal
- Structured as follows: Cover Letter, Experience and Qualifications, Technical Proposal, and Cost Proposal

2. Required Proposal Content

Cover Letter

Proposals must include a written cover letter; failure to provide information may result in the proposal being non-responsive and may be removed from consideration. Proposals must meet the Cover letter requirements by providing all documentation reference and respond to subsections in sequence, and then attach corresponding documentation as required. The cover letter must:

1. Provide the complete name and the Federal Employer Identification Number of the entity submitting the proposal.
2. State that the proposal remains valid for at least 90 days.
3. State whether the Proposer, or any individual who might perform services under the contract, has a possible conflict of interest, and if so, the nature of that conflict.
4. Provide the name, mailing address, e-mail address, telephone number and fax number of the individual(s) responsible for responding to this RFP.
5. Be signed by a company officer to bind Proposer to the provisions of this RFP and any agreement awarded pursuant to it.

Experience and Qualifications

Referencing subsections in sequence provide Proposer's Experience and Qualifications as outline below in delivering services similar to those required in this RFP:

1. A brief descriptive statement indicating Proposer's credentials to be delivered under this RFP
2. A brief description of Proposer's background and organizational history
3. Years in business
4. Location of Offices
5. Whether there have been any mergers, acquisitions, or sales of Proposer's company within the past ten (10) years, and if so, provide an explanation with relevant details
6. A personnel roster of key staff who shall be assigned by Proposer to perform services under this contract
7. Professional resumes of key staff who shall be assigned by Proposer to perform services under this contract
8. Three customer references for similar projects of like or larger scale that have been completed and one customer reference for similar projects of like or larger scale that are in progress. Each reference must include:
 - a. Company name and address
 - b. Name, title, email address and phone number of company contact knowledgeable about both the project and the quality of service(s) provided
 - c. A brief description of the project including date services were provided
9. A brief statement of the Proposer's plan for working with the Foundation's Selection committee to ensure maximum implementation of the Foundation's goals and objectives.
10. Brief summary of fundraising experience.
11. Brief summary of grant experience including, but not limited to the following:
 - a. Number of grants written
 - b. Number of grants awarded
 - c. Aggregate awards granted (\$)
 - d. List of grants applications submitted
 - e. Grant sample *(optional)*

Technical Proposal

The Proposer shall describe plans and approach for accomplishing the services requested. The information provided shall be in enough detail so as to enable Foundation to determine Proposer's understanding of the effort to be accomplished and should outline the steps for services to be provided. Proposal shall provide the following narrative information, referenced in the sequence outlined below, to evidence the suitability of the Proposer's technical approach to delivering the services required by this RFP:

1. Comprehensive narrative, entitled "Approach" that clearly illustrates how Proposer will complete the scope of services included in this RFP. Approach should include an estimated budgetary range to implement the Approach.
2. Comprehensive narrative, entitled "Understanding", that clearly illustrates Proposer's understanding of the Foundations requirements, and the associated project schedule, as stipulated in this RFP
3. Comprehensive narrative, entitled "Management" that clearly illustrates how Proposer will manage the contract, ensure completion of the scope of services, and accomplish the objectives and performance measures within the defined schedule as defined by this RFP.

Cost Proposal

The cost proposal is provided in section six of this RFP. The cost proposal shall be signed and dated by the Proposer. The cost proposal shall include proposed costs, and any other rates, amounts or associated cost information. It shall not include any text or narrative that could be construed as a qualification or the cost proposed. If the Proposer fails to provide cost information in the required format, or neglects to sign and date the cost proposal, Foundation shall determine the proposal to be non-responsive and reject it.

Section 5 - Scope of Work

The Foundation seeks a fundraising and marketing consultant to develop gifts from charitable foundations and family funds as part of a key strategic goal to expand the Foundation. The successful Proposer will have superior relationship building, grant writing, and communications skills. Consultant will also have creative approach to cultivating new and current donors. Additionally, this consultant will work with Foundation to expand its visibility in the community. This is a 6 month contracted position.

Qualifications and Requirements

- Understanding of the mission of Foundation and commitment to public education
- Familiarity and pre-existing knowledge with the San Francisco Bay Area funding landscape, particularly the Napa Valley
- Excellent interpersonal, oral and written communication skills, including an ability to speak compellingly about the Foundation, its mission and funding goals to individuals and groups within the corporate and foundation sectors
- Excellent organizational, time management, project management and follow-up skills; high sense of urgency; demonstrated ability to meet deadlines and successfully handle multiple projects concurrently
- Ability to work both independently and collaboratively
- Ability to lead and carry out the research and development of funding requests and reports
- Demonstrated success managing multiple projects and operating with purpose, urgency and accuracy in a fast-paced, deadline-driven environment
- Strong work ethic and positive attitude, with a willingness to be flexible and do whatever it takes to get the job done
- Prior grant writing and/or fundraising experience
- Comfort engaging in cultivation, solicitation and stewardship of donors and sponsors
- Prior experience working with nonprofit board of directors
- Experience working with organizations solely or primarily led by volunteers
- Eagerness/ability to identify challenges and implement solutions

Scope of Work

The Foundation is seeking a Fundraising and Marketing consultant to assist in three primary business areas: Grant Writing; Fundraising; and Public Relations. Responsibilities will include, but will not be limited to, the following areas:

1. Grant Writing

The Foundation seeks a proven grant writer who can successfully write grants to a broad spectrum of grant funders and to an equally broad spectrum of grant types. The development and implementation of a formalized, integrated, results-driven grant program should include, but not be limited to the following:

- Review RFP's and foundation funding sources for prospects, and coordinate production of government, foundation and corporate funding requests to meet all requirements.
- Research and write high quality grant applications to grant funders with maximal chances for successful award, with a minimal target of \$150,000. Foundation acknowledges time delays between grant application submission and award, so potential value of pending but unfunded grant applications will be recognized.
- Prepare monthly activity/results report to Foundation Board of Directors that includes status of all pending grant applications
- Manage various components of development activities.
- Prepare and manage donor and grant correspondence, from formal grant reporting to donor Correspondence

2. Fundraising

The Foundation seeks a consultant with a proven history of development and implementation of successful fundraising campaigns. The development and implementation of a formalized, integrated, results-driven fundraising strategy should include, but not be limited to, the following

- Work closely with Board of Directors to prepare a strategic fundraising plan with measurable objectives and timetable.
- Create a fundraising plan of prospects and a schedule of actions that will result in achieving the revenue goal.
- Steward existing donor relationships.
- Identify new prospects from outside the current donor pool, cultivate those relationships and identify gift opportunities that match donor interests, make recommendations on prospective sources of funding and fundraising, and secure major gifts from these prospects.
- Proactively explore options for identifying major donor prospects and participate in donor/prospect cultivation, solicitation and stewardship activities.
- Fundraising targets are defined to be from efforts and events that are not currently in use by the Foundation.
- Coordinate, create, manage and execute fundraising activities (including reporting functions) to secure private and public funding including Individual donor campaigns; Endowment campaign, Annual campaign, Direct mail campaigns, Effective use of Media, and Newsletters.
- Maintain fundraising data base with help from admin staff, secure in-kind donations, and other fundraising activities as needed/deemed appropriate.

3. Marketing and Public Relations

The Foundation seeks a consultant experienced in the development of successful communication and public relations strategies. The consultant will increase the recognition of the Foundation to residents, businesses, and community organizations. The development and implementation of a formalized, integrated, results-driven communications and public relations strategy should include, but not be limited to the following:

- Develop a marketing and public relations plan, in conjunction with the Board of Directors, to successfully raise the Foundations' visibility in the community.
- Work with Board of Directors to develop a unified marketing plan.
- Write and place press releases and write content for Foundation's website and mailings.
- Produce appropriate marketing pieces to create brand awareness of the Foundation.

Reporting

Consultant will provide a monthly report, on a form to be developed by Foundation. This report will include a status update on grant applications, activity during reporting period, results during reporting period and contact information for all new prospective donors identified during reporting period.

Reports will be submitted electronically to the Foundation one week prior to regular Foundation Board meetings. Consultant must be available to discuss reports with Foundation representative(s) in advance of Board meeting. Consultant will attend Board meetings to provide a verbal update as to efforts and results. Consultant is to periodically meet with Board representatives, on a frequency to be defined, to evaluate achievement of incremental goals.

Invoicing

This contract is for an amount not to exceed thirty thousand dollars (\$30,000.00). Monthly consultant payment/distributions to the contract will be of equal sum calculated as the contract maximum divided by the term of the contract in months.

Contractor will provide a monthly invoice, on a form to be developed by Foundation. This report will include itemized expenses incurred during reporting period and aggregate expenses to date. Reports will be submitted electronically to the Foundation Treasurer one week prior to regular Foundation Board meetings. Consultant must be available to discuss reports with Treasurer in advance of Board meeting.

Section 6 - Proposal Evaluation and Award

Categories that shall be considered in the evaluation of proposals are as follows:

<u>Evaluation Criteria</u>	<u>Weight</u>
Technical Proposal Approach	20
Grant Writing Experience	20
Fundraising Experience	20
Marketing and Public Relations Experience	20
Local Contacts	15
Samples of Work Provided and Evaluated	5
TOTAL	100

Evaluation Process

The Selection Committee will conduct a comprehensive, fair and impartial evaluation of the proposals received in response to this request. Proposals may not be considered if general and technical requirements as specified are not met.

Evaluation of General Requirements

Proposals will be evaluated according to completeness, content, experience with similar projects, ability of the Contractor, cost and adherence to proposal requirements. All proposals for this RFP shall be reviewed by the Selection Committee to determine compliance with all proposal requirements. The Selection Committee will use the weighted evaluation criteria identified above to rate all submitted proposal. The Selection Committee will identify finalists to present to Board of Directors for their review. Award of a contract to one Contractor does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was deemed to provide the best value to the Selection Committee.

Evaluation of Technical Requirements

Selection Committee will evaluate the experience, corporate resources and corporate qualifications of the Contractor. The detailed evaluation criteria will include a priority given to experience in providing similar services as detailed above in section "Qualifications." The proposal will be evaluated to determine if it complies with the instructions to Contractors as described in this RFP. Any proposal that is incomplete or in which there are significant inconsistencies or inaccuracies will be rejected by the Selection Committee. The Selection Committee reserves the right to reject any or all proposals.

Evaluation of Cost

The proposed cost will be evaluated for completeness and reasonableness. In awarding the Contract, the cost is important but may not be the determining factor. The proposed cost will be evaluated to determine if it complies with the instructions to Contractors. Any proposed cost that is incomplete or in which there are significant inconsistencies or inaccuracies will be rejected by the Selection Committee.

Determination of Successful Proposal Based on the Combination of Technical and Cost Proposals

The Contractor whose combination of qualifications, experience and cost are deemed to be in the best interest of the Selection Committee will be selected as the successful Contractor. The Selection Committee will notify the selected Contractor and request the precontracting information and that the Contract is signed. If all proposals are rejected, Contractors will be notified promptly. The Contract must be executed prior to the start of work.

Contract Award Process

The Board will review the proposal finalists as submitted by the Selection Committee, and will decide on appropriate action by majority vote. The Foundation reserves the right to reject any and all proposals and to waive any irregularity therein, and is under no obligation to award this contract if that is the recommended action of either the Board or the Selection Committee.

The Procurement Process

In soliciting proposals for this contract, the Selection Committee requests a comprehensive proposal in accordance with the format and guidelines specified herein. Prospective Contractors should note that any deviation from these guidelines may be considered grounds for disqualification on the basis of non_responsiveness. The proposal is due, as indicated on the cover of this RFP, with two copies, plus one signed original. The proposals must be received at the Partnership address listed on the front of this RFP.

Confidential Information

Trade secrets or similar proprietary data which the Contractor does not wish disclosed to anyone other than personnel involved in the evaluation or contract administration will be kept confidential, if identified as follows: each page shall be identified in bold face at the top and bottom as "Confidential." Any section of the proposal that is to remain confidential shall also be so marked in bold face on the top of the title page of that section. Cost information may not be deemed confidential. In spite of what is labeled as confidential, the determination as to whether or not it is confidential shall be governed by California law.