

Franciscan Mission Service Request for Proposals (RFP) for Major Gifts Initiative

Posted: March 21, 2016

Deadline: April 27, 2016, by 5:00 p.m. EST

Section 1-Summary

Franciscan Mission Service (FMS) seeks to partner with an experienced major gifts development consultant to launch and lead a new Major Gifts Initiative to support the development of the next generation of its international and domestic mission programs. Through this engagement, FMS aims to:

- establish a sustainable and comprehensive individual major gifts program;
- educate and activate its Board of Directors on best practices, strategies, and engagement of individual donors;
- and secure sufficient funding to finance FMS' next strategic growth phase (an additional \$150,000 in one year, 200,000 in the second year).

Background

Throughout its 26-year history, FMS has touched countless lives through its ministry of presence overseas and in Washington, D.C. Currently, FMS missionaries of all ages serve in Bolivia, Guatemala, and Jamaica, while young adult volunteers serve in Washington, D.C. through two, distinct domestic programs focusing on professional and leadership development. In addition to pursuing programmatic growth, FMS has more than doubled its revenue in the last five years and has undergone a strategic planning process to guide the future of the organization. Finding itself in a position of stability and strength, FMS would like to further enhance its fundraising efforts by tapping into the full potential of current individual and institutional donors, as well as by reaching new donor audiences.

Mission Statement

As Franciscan followers of Christ, we build partnerships with Catholic women and men who are inspired to live and serve in solidarity with economically poor communities across the globe – and to bring the transformative experience of mission to North American societies and churches as advocates for peace, justice, reconciliation and care of creation.

Core Statements

The following seven statements outline the core belief system from which FMS operates. They define the “soul” of FMS and inspire the work of staff, volunteers, and missionaries.

- We have faith in the transforming power of Christ's love in the world.
- We believe the world is a graced place.
- We believe in the absolute and fundamental dignity of each individual and creation.
- We embrace Catholic Social Teaching as central to our faith and service.

- We have confidence in the wisdom of poor communities.
- We engage in a mission of presence, accompaniment, and advocacy.
- We believe strong theological and cross-cultural training leads to respectful and effective mission service.

Section 2-Scope of Work

Project Management and Stakeholders

- The **Executive Director** and **Associate Director for Programs and Operations** will work closely with the selected consulting team and internal staff to provide guidance, feedback, and input during the development of the Major Gifts Initiative.
- The **Board of Directors** will provide final approval for initiatives undertaken during or as a result of this project.

Work Tasks

The three components below form the basis of FMS's issuance of this RFP. The tasks listed below each component are desired at this time, though FMS may change or eliminate tasks may after dialogue and negotiation with the Board of Directors, prospective consultants, and/or the selected consultant. Required tasks will be included in the final, negotiated contract with the selected consultant.

Component 1: Establish a sustainable and comprehensive individual major gifts program

- Assess current approach to fundraising and provide written feedback
- Drawing on FMS's mission and the strength of FMS's current fundraising strategies, develop an in-depth plan for the cultivation of major gifts.
- Provide guidance about how staff members can support the major gifts process.

Component 2: Educate and activate the FMS Board of Directors on best practices, strategies, and engagement of individual donors

- In collaboration with the Executive Director, design and lead a training session for the Board of Directors.
- Develop comprehensive guidelines for Board Member-Donor engagement.
- Recommend opportunities for ongoing professional development in the area of donor engagement.

Component 3: Secure sufficient funding to finance FMS' next strategic growth phase (an additional \$150,000 in one year, 200,000 in the second year).

- Identify new sources of major funding
- Create strategy for approaching new funding sources.

Section 4-Proposal Submittal Requirements

All proposals are due by April 27, 2016. Respondents should submit electronic copies to rfp@franciscanmissionservice.org.

Franciscan Mission Service reserves the right to reject any and all proposals or to disqualify any

proposal that is late or does not comply with stated requirements. Expenses incurred in the preparation of proposals are borne by the consultant with the understanding that neither the selected consultant nor the rejected consultants may apply to Franciscan Mission Service for reimbursement of these expenses.

Proposal Components

The proposal should contain the following sections in order:

1. Letter of transmittal
 - a. Statement demonstrating understanding of the work to be performed
 - b. Primary contact person and his/her contact information
 - c. Availability between June 1, 2016 and November 1, 2016
2. Qualifications/Project Portfolio
 - a. Areas of specialization
 - b. Practice philosophy
 - c. Portfolio of relevant work completed
3. Methodology and Approach
 - a. Approach to the project elements
 - b. How your qualifications match your approach to the project elements
4. Project Management
 - a. Detailed descriptions of the procedures and methods you propose to complete all tasks within the scope of work
 - b. Proposed work schedule/plan consisting of tasks, timeline, anticipated deliverables and target dates
5. References
 - a. Names, phone numbers, and email addresses of individuals at five nonprofit organizations who have been your clients during the last two years and whom FMS may contact as references.
6. Fees
 - a. Consultant hourly rates
 - b. Composite schedule of hours estimated for included tasks
 - c. Itemized schedule of all expenses, including labor and direct expenses
 - d. Allowance for reimbursable expenses
 - e. If sub-consultants are proposed, include separate schedule of expenses

Section Five-Selection Process

Evaluation Criteria

FMS will select the Respondent whose credentials and submittal best meets the needs of the organization. In evaluating proposals, FMS will assign points (25 points possible for each category) based on the following:

1. 25 points-Qualifications/project portfolio provided by the respondent and related experience of consultants and staff with a specific focus on small nonprofits
2. 25 points-Commitment and ability to complete the project within the timeframe specified in the proposal while displaying high quality and promise of lasting impact

3. 25 points- Demonstrated understanding of the purpose and desired outcomes of this project including awareness of the funding climate/players in the Catholic volunteer and mission environment
4. 25 points-Ability to meet project requirements within the available budget

The Executive Director, in collaboration with the Associate Director for Programs and Operation and the Board of Directors will review, evaluate, and rank respondents. After the review of written proposals, the Executive Director or Associate Director may invite finalist to make an oral presentation. After a final review of applications, Franciscan Mission Service will finalize the scope of work and execute a contract with the selected consultant.

Award Process and Timeline

- **March 21, 2016: Issue of RFP**
- **April 27, 2016: RFP Responses Due**
- **April 28-May 18: Evaluation of Proposals**
- **May 19, 2016: Notification of Finalist(s)**
- **May 23-June 3, 2016: Finalist(s) Interview and Negotiation; Executive Director Selects Consultant**
- **June 6-June 13, 2016: Finalization of Contract, Official Kick-Off**
- **November 11, 2016: Project Wrap-Up**

Project Contact

Questions related to this proposal should be directed to:

Meghan Meros

Associate Director for Programs and Operations

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