Request for Proposal

Outsourced Development Services

Issue Date: March 5, 2021

Submission Deadline: Friday, March 19, 2021 (5:00 p.m. EST)

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PEAK Grantmaking
carolyn@peakgrantmaking.org
1. **Request for Proposal (RFP)**

   PEAK Grantmaking invites you to respond to this Request for Proposal (RFP). The focus of the RFP is to select a single organization to provide Development Services to PEAK Grantmaking beginning on May 1, 2021, through December 31, 2021, with a possibility to extend the term with satisfactory performance. Please indicate in your proposal if your contract is on a month-to-month basis or for specified period of time.

2. **Introduction to PEAK Grantmaking**

   PEAK is a member-led organization that began as an informal networking group and grew into a national organization in 1996. The organization was incorporated as a 501(c)(3) public charity in 2006. Currently, we have more than 5,500 members. This year, we celebrate our 25th anniversary and – as a component of this milestone – are reshaping our mission, vision, short- and long-term organization priorities, staff capacity, board composition, and strategic framework. Only for brief periods and two key growth campaigns, has the organization retained development/fundraising services.

   Our mission is to advance grantmaking so grantmakers and grantseekers can best achieve their missions. We connect members of the grantmaking profession, offer educational opportunities for grants management professionals at all levels, and guide grantmakers in strengthening practices – improving outcomes for grantmakers and grantseekers alike.

   PEAK Grantmaking has one facility located at 1666 K Street, NW, Suite 440, Washington, D.C., 20006. Currently, PEAK has 12 staff members that are 100% remote due to COVID-19, and we expect to have no more than 15 staff members by Q3 2021.

3. **Project Objectives**

   PEAK has several goals for the issuance of this RFP:
   - Create a new development strategy that complements our current membership, sponsorship and donor outreach efforts.
   - Acquire secure, ongoing development assistance and support, which taps into different skills and toolkits that align with fundraising in the current virtual environment, and helps us reach our fundraising goals.
   - Learn fundraising best practices that advance the skills of key staff and our board.
   - Establish pre-requisites needed as we rebuild our technology platforms and communications vehicles.

4. **Scope of Expertise**

   The following represents the desired scope of expertise for this proposal:
   - The ideal vendor will embody genuine interest in and appreciation for philanthropy and philanthropy sector serving organizations (PSO) with an awareness of all types of funders from traditional nonprofit funders to community foundations, giving circles, program- and mission-related investments, and high net worth individuals.
   - The ideal vendor will have a demonstrated committed to diversity, equity and inclusion, raising funds for small, grassroots and nonprofit leaders of color.
   - We seek a firm with a successful track record in a competitive fundraising/philanthropic landscape; demonstrated ability to create and implement successful strategies to expand a membership donor base; ability to evaluate, assess, and create a new donor affinity group structure; successful experience building a pipeline of prospects; partnership management, major gift donors and
prospects; major gift solicitation experience, board and staff training and support. 

- The ideal vendor must be strategic, creative, and able to work well with staff, board, and committee teams and respond to unanticipated external challenges; proven ability to foster, enhance, and expand relationships with existing donors and to influence and tap new, diverse supporters.

- PEAK seeks a firm that has strong administrative skills, a collaborative working style, exceptional communication ability who can craft and articulate compelling, persuasive cases for support; knowledge of research methods and information resources; working knowledge of commonly used fundraising software applications; commitment to embracing current and emerging best practice tactics such as social media strategies and e-philanthropy.

5. Selection Criteria and Process
PEAK will use multiple criteria to select the most appropriate partner. Respondents are encouraged to be creative with their proposals. The following list summarizes the major qualitative areas that will be evaluated with the award made to the respondent that provides the perceived best value.

- Completeness and suitability of respondent’s proposed solutions to service requirements;
- Industry expertise and relevant experience;
- Demonstrated client responsiveness;
- Successful track record of success; and,
- Proven track record with small nonprofit development campaigns.

All responses will be evaluated according to this process:

- Review and scoring of responses, including obtaining any necessary clarification from respondents.
- Identification of 2 - 3 final candidates for in-depth review of capabilities, including interview and presentation. Engagement will take place via Zoom.
- Reference checks.

6. Key dates
Below is a timeline with estimated dates for each step of the process. By participating in the RFP process, respondents agree that they can follow this general timeline. We will notify respondents if this timeline significantly deviates from what is stated below.

<table>
<thead>
<tr>
<th>Task</th>
<th>Completion Date (2021)</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP distribution to identified companies</td>
<td>March 5</td>
</tr>
<tr>
<td>Notice of intent to respond and questions</td>
<td>March 8</td>
</tr>
<tr>
<td>due</td>
<td></td>
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<tr>
<td><strong>Responses due</strong></td>
<td><strong>March 19</strong></td>
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<tr>
<td><strong>Final candidates selected and notified</strong></td>
<td><strong>March 26</strong></td>
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<tr>
<td>Final candidates interviewed</td>
<td>April 2</td>
</tr>
<tr>
<td>Notify respondents not selected</td>
<td>April 5</td>
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<tr>
<td>Awardee notified; contract negotiations</td>
<td>April 12</td>
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<tr>
<td>begin</td>
<td></td>
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<tr>
<td>Notify final candidate(s) not selected</td>
<td>April 14</td>
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7. **Events of Note in the PEAK Grantmaking Schedule**
   These events will be of interest when planning a deployment timeline, as staff will be involved in the preparation and execution of the following events.

   - Board Meeting – Tuesday, April 6 and Wednesday, April 7
   - Annual Membership Meeting & kickoff of 25th anniversary events – Tuesday, April 27
   - PEAK2021 Virtual Conference – Tuesday, May 4 through Thursday, May 13
   - Board Meeting – Wednesday, July 28 and Thursday, July 29
   - 25th Anniversary Panel Conversation Event – Tuesday, September 14
   - Board Meeting – Wednesday, October 14 and Thursday, October 15
   - 25th Anniversary Year-End Celebration – Thursday, December 2
   - Board Meeting – Wednesday, December 8
   - PEAK2022 Annual Conference: New Orleans – March 21-23, 2022

8. **Response Contents and Format**
   Please complete all sections of the RFP. If additional material is required for one or more questions, please label attachments clearly and reference them in your response. Your response to this RFP will serve as the basis for the consideration of your potential as a partner.

9. **Information Requirements**
   For the purposes of understanding more about your company and your ability to successfully fulfill this important PEAK requirement, please provide the information below as part of your response, clearly referencing each specific question

10. **Corporate Information**
    1. Give a brief overview of your organization’s involvement in providing development services.
    2. Indicate the number of employees in your organization.
    3. Please describe the range of development services available (e.g., capital campaign, grant seeking)
    4. Will you subcontract any components of the proposed solutions to third-party organizations? If so, please describe the components to be subcontracted and provide details of any agreement in place with the subcontracted firm/individuals, as well as a summary of past work that you have successfully completed together.
    5. Please provide references for 3 current customers that are similar in scope and requirements to those of PEAK.

11. **Scope of Work**
    1. Assess PEAK’s current revenue program, board and staff expectations, current capacity and environmental context for revenue generation.
       - Identify strengths and weakness of existing events and infrastructure to determine areas for improvement and development.
• Assess the opportunities and threats external to the organization, as well as the agency readiness that will inform the revenue plan to ensure its success.

2. Develop a multi-year development plan and implementation strategy to build the revenue program with a focus on multi-year, programmatic grant support, sponsorships, and unrestricted revenue reflective of and in alignment with PEAK’s mission/vision/values. The focus is on long-term sustainability including exploring alternative revenue streams so a level of innovation in the proposal will be highly appreciated.

3. Develop a comprehensive revenue plan with strategies to increase PEAK’s revenue efforts from (1) members (2) grants and (3) special events.

4. Recommend key components and tactics for 2021/2022 implementation.

5. Initiate the implementation stage in conjunction with the CEO, Management Team, and Board leadership through the initial term of the plan.

12. Communications and Response

12.1 Primary Contact for All Inquiries
Carolyn Sosnowski
Interim Special Projects Manager
PEAK Grantmaking
carolyn@peakgrantmaking.org
202-870-0189

12.2 Notice of Intent to Respond Instructions
Indicate your intent to respond to the RFP and propose any clarifying questions by sending an email to Carolyn Sosnowski at carolyn@peakgrantmaking.org on or before close of business (5:00 pm ET) on Monday, March 8, 2021.

12.3 Response Delivery Instructions
Please submit an electronic copy of your proposal to Carolyn Sosnowski at carolyn@peakgrantmaking.org. All responses must be received on or before close of business (5:00 pm ET) on Friday, March 19, 2021.

13. No Obligation
The submission of a proposal shall not in any manner oblige PEAK to enter into a contract or to be responsible for the costs incurred by your organization in responding to this request.

14. Agreement of Non-Disclosure
This document is considered to be proprietary and shall not be disclosed to any other party. It is designed, developed, and submitted to potential partners of PEAK solely for the benefit of PEAK.

15. No Guarantee
PEAK makes no guarantee of future volumes and offers volume information for directional purposes only, to assist vendors with proposal preparation.

16. Right to Reject
PEAK reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be based upon the factors described in this RFP.

17. Right to Extend and/or Re-advertise the RFP
PEAK reserves the right to extend the proposal deadline or re-advertise the RFP due to the receipt of an insufficient number of proposals or proposals that do not meet the criteria of the RFP. In the event that the RFP is extended or re-advertised, written notification will be sent to each recipient of record of the original RFP. Recipients of record are those parties who obtained a copy of the RFP directly from PEAK.

18. Small and/or Women/Minority-Owned Businesses
Preference will be made by PEAK to utilize small businesses, as well as minority-owned and women-owned business enterprises. An Offeror qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 CFR 121.201).

19. Notification of Award
It is expected that a decision selecting the successful firm will be made within 4 weeks of the closing date for the receipt of proposals. Successful final candidates (2-3) will be invited to interview. Upon conclusion of final negotiations with the successful firm, all Offerors whose proposals in response to this RFP were considered will be informed, in writing, of the name of the successful firm.