

Campaign Planning Study Request for Proposal

Organizational Information

Chesapeake Bay Foundation
6 Herndon Avenue, Annapolis, MD 21403

Josh Young, Director of Research and Prospect Management
Email: jyoung@cbf.org
Direct line: 443-482-2113

January 6, 2017



Introduction

Founded in 1967, the Chesapeake Bay Foundation (CBF) is the largest independent conservation organization dedicated solely to restoring the Chesapeake Bay.

Summary of Need

CBF is interested in engaging a firm to lead a fundraising campaign planning study. As we enter the second half of the 2010 - 2025 federal/state plan to restore the Chesapeake Bay, resources are needed to enable CBF to intensify efforts to support this ambitious plan. To be successful, CBF will need to boost fundraising and engage members, major donors, foundations, and corporations.

The Project

After decades of slow progress and missed goals, the Chesapeake Bay's health is improving under an innovative and collaborative federal / state cleanup plan known as the Chesapeake Clean Water Blueprint. We measure this progress by our State of the Bay report, which this year rose to a new all-time high since it was first released in 1998. While our work focuses on improving water quality in the Bay and its system of tributary rivers and streams that drain a six-state, 64,000 square-mile region, we know parts of the country are watching what happens here. We may well be the front-runner for environmental restoration.

To date, implementation of the Blueprint has achieved historic improvements to the Bay's health, from increasing the coverage of underwater grasses, to helping wildlife populations to recover. CBF is leading the way in supporting, defending, and implementing the Blueprint. We do so by educating the public; mobilizing advocates; working with partners at the federal, state, and local levels; restoring the natural environment; and providing meaningful outdoor education to students and teachers to prepare the next generation of environmental stewards.

In spite of real progress, the job is far from done, and uncertainty and challenge are a constant. As we enter the critical 2017 mid-point of the Blueprint, resources will be needed to tackle some significant challenges and ensure the plan's full implementation. Some of our priorities in the coming years include:

- Increasing outreach, advocacy, and restoration work in Pennsylvania, the state that has made distressingly little progress in reducing pollution under the plan;
- Addressing agricultural pollution and runoff from cities and suburban areas;
- Bolster and diversify public and political will for saving the Bay by engaging new communities so that our coalition of advocates and members better reflects the demographics of our region;
- Expanding our work to restore the Bay's native oyster, a species that naturally filters the Bay's water; and

- Remaining nimble amidst a changing political landscape.

The coming campaign will support these initiatives, among others, by providing financial resources and energizing our members and donors. The timing of the campaign coincides with two critical milestones: the Blueprint's mid-point and CBF's 50th anniversary. We hope these two milestones serve as rallying points, providing a platform to recognize the organization's history of leadership, innovation and the progress that we've made, while generating enthusiasm and funds to support more targeted, ground-breaking strategies as the movement gains momentum. To facilitate planning, CBF is interested in engaging a firm to lead a campaign planning study.

Scope of Work:

- Draft a preliminary case for support, testing effective donor-focused language;
- Research and analysis of the community's perception of the organization and the importance and need for the project;
- Analyze size of the potential donor base and its ability to give, identification of top donor prospects;
- Recommendations for campaign leadership, structure of the group, and an assessment of potential volunteers;
- Recommendations on timing of the campaign, both start date and length;
- Opportunities to engage new community centers and populations, diversifying our donor base;
- Opportunities to engage our membership base;
- Recommendations on campaign goals, including operating, endowment and planned giving goals. A chart of gifts delineating size and number likely needed at each level of giving to achieve the campaign goals;
- Assessment of internal resources available for the campaign;
- Assessment of external factors that could influence the outcome of the campaign; and
- Identify other challenges and opportunities CBF may encounter.

CBF may request that a formal review of the findings is presented to our Board of Trustees or a Board subcommittee.

Please feel free to recommend additional resources that your firm can provide that will aid in campaign planning and management.

Please include the following information in your response:

- The name and full contact information of your company and, if applicable, any other entity comprising your team. Please attach resumes or bios of staff who would be involved.
- Please provide a description of the study methodology and process, including number of interviews recommended and a description of fact-gathering other than interviews (focus groups, mail surveys, etc.); how you identify persons to interview, and what information and recommendations will be included in the final report.
- What distinguishes your processes and approach from those of others?
- Outline the responsibilities of CBF vs. your firm. Please detail the expectations of staff and volunteers/board members. Identify resources and information required from CBF.
- Provide an estimated timeline/working schedule.
- Outline the fee proposal, detailed to the greatest extent possible, including: cost for service, hourly rates (if applicable), typical direct out-of-pocket costs (such as travel reimbursement, copies, mailings), and any other anticipated expenses that you foresee. Describe any costs your firm will not cover.
- CBF is specifically interested in candidates with experience consulting for environmental organizations. List and describe three relevant projects completed within the previous three years.

- List three client references including contact information, for whom you or your team members have completed work similar to that described in this RFP. References from other environmental groups are preferred.
- Include basic information and history about the business entity, including financial information, technical capability, and any other information you feel is important for us to know.

Schedule

- We request that your proposal be delivered electronically to Josh Young no later than 5:00pm on January 31, 2017.
- It is the intent of CBF to make a selection no later than February 28, 2017. We will notify you once a decision for award of bid is made.
- If at all possible, our preferred date of completion for the project is June 30, 2017.

Interviews

We anticipate engaging top candidates in interviews. Date and times will be mutually agreed upon by CBF and candidates.

Minority Participation

CBF actively encourages proposals from Small, Women and Minority Owned (SWAM) businesses. Please note if you are a Small, Women or Minority Owned business and if you are certified by the State/Commonwealth/DC.

A successful applicant may need to provide proof of insurance based on the services or product provided.

The undersigned certifies that the information submitted is true and accurate.

The undersigned certifies that the person, firm, association, co-partnership or corporation herein named, has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in the preparation and submission of a proposal to the Chesapeake Bay Foundation for consideration in the award of a contract.

The undersigned further certifies that the firm, association, or corporation or any person in a controlling capacity associated therewith or any position involving the administration of federal funds; is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any federal agency; has not been suspended, debarred voluntarily excluded, or determined ineligible by any federal agency within the past three years; does not have a proposed debarment pending; and has not been indicted, convicted, or had a civil judgment rendered against said person, firm, association, or corporation by a court of competent jurisdiction on any manner involving fraud or official misconduct within the last three years.

I further acknowledge that by signing this page of the proposal, I am deemed to have agreed to the provisions of the affidavit.

(Name of Firm)

(Authorized Signature) (Title)

(Please print Name)