



# Children's FRIEND

Children's Friend is an Affirmative Action/Equal Opportunity Employer

## **Development Consultant Engagement**

### **RFP COORDINATOR:**

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**Issued Date: Tuesday, July 2, 2024**

## **Introduction**

You have been selected as a vendor to respond to this request. If you are interested, please prepare a proposal to accomplish the task that includes a timeline, cost, and deliverables. The following RFP (Request for Proposal) includes a background of our organization and describes the purpose of the redesign, its desired functionality, and specific requests relating to the proposal. We understand that details may be subject to change upon vendor recommendation and / or research of more optimal solutions. In your proposal, please feel free to suggest alternatives where noted.

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## **1. Guide to this RFP**

This request is designed to convey our intention in increasing the capability of our Board of Directors and senior and executive staffs to assist in the cultivation and securing of major gifts and developing a culture of philanthropy across the organization. The preferred vendor will bring its own ideas and vision based on industry expertise, technical capability, and client relations, guiding us to incorporate our goals into that vision.

## **2. Project Overview**

Children's Friend is the innovative leader in improving the well-being and healthy development of Rhode Island's most vulnerable young children. We seek to nurture children and empower families. Children's Friend seeks to achieve a fundraising target of \$382,000 through individual contributions in 2024. With a new development team in place, we are dedicated to fostering a culture of strategic philanthropy to enhance individual support. To this end, we seek to engage development consultants to provide essential training to our Board of Directors and executive staff and to devise customized plans for leveraging our new donor management system, Virtuous.

This RFP is issued solely for information and planning purposes, and Children's Friend reserves the right to reject any and all bids without further obligation to any bidder. Thus, this document does not commit Children's Friend to contract for any service, supply, or subscription whatsoever. Children's Friend will not reimburse any information or administrative costs incurred due to participation in response to the RFP. All costs associated with response will solely reside at the responding party's expense.

## **3. Background**

Children's Friend is dedicated to improving the lives of children and their families by providing comprehensive early childhood education, care, and family support services. Our mission is to ensure that every child has the opportunity to succeed, regardless of their background or circumstances. With a predominantly new development team, we are focused on building a culture of strategic philanthropy. Strengthening individual contributions is critical to our success and future capital campaign efforts. We plan to leverage our new donor management system, Virtuous, to maximize donor engagement and support.

Children's Friend services include adoption and foster care programs, parent education, Early Intervention services, nurse-family visiting programs for high-risk newborns, Nurse-Family Partnership, Healthy Families America, WIC (Women, Infants, and Children), Early Head Start, Early Head Start-Child Care Partnerships, Head Start, State-funded Pre-K, a summer learning and enrichment program, child care services (including therapeutic child care for children with special needs), and a variety of family support and family preservation programs.

By investing in capacity building, we aim to foster a stronger culture of philanthropy among our board members, enhance their understanding of their roles in fundraising, and primarily focus on increasing unrestricted giving.

#### **4. Project Goals**

The primary goals of this RFP are to enhance the engagement of the Board of Directors and executive staff in fundraising by providing targeted training that clarifies their roles and responsibilities and fostering a culture of strategic philanthropy within the leadership. Additionally, the RFP aims to improve donor management and contribution strategies by developing and implementing customized approaches for managing donor information through the Virtuous CRM system, focusing on optimizing donor engagement and increasing unrestricted giving. A critical goal is to ensure the ongoing support and sustainability of these initiatives by providing continuous guidance and practical resources that can be easily integrated into existing workflows. The RFP also seeks to deliver effective tools and comprehensive reports that track progress, highlight outcomes, and offer recommendations for continuous improvement, ultimately driving more flexible and sustainable financial support for the organization.

#### **5. Scope of Work**

To engage development consultants to provide training and support in two key areas:

1. Training for Board of Directors and Executive Staff: Develop and deliver training in their roles in development efforts and strategic philanthropy.
2. Customized Donor Management Strategies: Devise and implement plans for extracting and utilizing donor information from Virtuous to enhance individual contributions.

Tasks:

The selected consultant(s) will be responsible for:

- Conducting training sessions for the Board of Directors and executive staff on effective fundraising strategies and their roles in development.
- Creating customized plans for extracting and analyzing donor information from Virtuous to optimize donor engagement and contributions.
- Providing ongoing support and guidance to ensure the successful implementation of these strategies.

Deliverables:

1. Training materials and sessions for Board and executive staff.
2. Detailed customized plans for donor management using Virtuous.
3. Regular progress reports and a final project report summarizing outcomes and recommendations.

## **6. Budget**

Children's Friend has been awarded a capacity-building funding grant that has allowed the organization to pursue this opportunity while ensuring that all associated services are procured within reasonable and justifiable costs.

## **7. Project Timeline**

- Estimated Project Start: October 2024
- Project Completion: March 2025

## **8. Response Process**

- Notification of Intent to Respond and Clarifying Questions:
  - Please indicate your intention to respond to this RFP by email to the Primary RFP Contact listed below by the Intent to Respond date outlined in the next section.
  - Please provide the contact details of the individual responsible for coordinating your RFP response. At the same time, we ask that you submit any clarification questions regarding the RFP.
  - Any answers to questions will be provided in writing and made available to all known interested parties.
- Primary RFP Contact
  - Please direct all inquiries regarding this RFP to:  
Pamela Verklan  
Chief of Philanthropy

Children's Friend  
pverklan@cfsri.org

- Response Delivery Instructions:
  - Children's Friend requires responses to this request for proposal to be delivered in writing via email. You may attach documentation to support your answers, if necessary. Please submit all responses via electronic delivery no later than Friday, August 2, 2024, by 5 PM to:

Pamela Verklan  
Chief of Philanthropy  
Children's Friend  
pverklan@cfsri.org

Any response received after the delivery date specified will not be considered without prior written or electronic approval.

## 9. Criteria for Selection

Children's Friend will evaluate responses to this RFP based on multiple criteria and will select the best overall solution to fit its needs. Children's Friend is not obligated to select the lowest price bidder and the bidder acknowledges and agrees that Children's Friend retains the right to reject any and all bids without obligation to enter into a binding contractual relationship with any bidder. Further, Children's Friend reserves the right to enter into a competitive negotiation process between one or more bidders. All responses will be evaluated in the following areas:

- Relevant experience and qualifications of the consultant(s)
- Understanding of the project scope and objectives
- Proposed approach and methodology
- Quality and feasibility of the work plan
- Cost-effectiveness and budget alignment
- References and past performance

## 10. Format & Proposal Details

RFP responses should include:

- Cover Letter (e-mail)
- Overview Document
- Statement of Work Detail
  - Proposed project timeline
  - Project budget with line items

- Background, qualifications, and relevant experience of the consultant(s) who would be working on this project.
- Proposed Approach: Description of the approach and methodology to be used for training and donor management strategy development.
- Examples of similar projects
- Client references: Contact information for at least three references from similar projects.
- A summary explaining why you/your firm is most qualified.
- The vendor must sign and include as attachments to its proposal the Vendor Certification, Equal Opportunity and Non-Discrimination form, which are enclosed with this RFP, located on pages 10-11 of this request.
- As part of the RFP response, vendors will need to provide a brief statement regarding the ownership of the produced materials and provide the firm's policy regarding intellectual property issues. Please include in the proposal what will be required for Children's Friend to own the final work produced.
- A certificate of insurance (COI) to include the following:
  - Comprehensive and general liability coverage in the amount of \$2,000,000 in the aggregate and \$1,000,000 per occurrence; this coverage must be written on an occurrence form.
  - Excess liability coverage in an amount of not less than \$1,000,000.
  - Workers Compensation Coverage, as Statutory by the State of Rhode Island for all employees. Employer's liability coverage on the Workers' Compensation policy shall be written in the minimal amount of \$500,000.
  - Comprehensive Automobile Liability Coverage, in an amount of not less than \$1,000,000.
- Copy of W-9.

## **11. Selection Timeline**

Below is a general timeline outlining the process steps with estimated dates for each step of the process. By participating in the RFP process, vendors agree that they can adhere to the following general timeline and the meeting times they reserve throughout this process.

- RFP Release: Tuesday, July 2, 2024
- Questions Due: Friday, July 19, 2024
- Responses Due: Friday, August 2, 2024

- Virtual Interviews: Starting Monday, August 26, 2024
- RFP Selection: Friday, September 6, 2024
- Estimated Project Start: Tuesday, October 1, 2024

## **12. Confidentiality Statement**

All information presented in this RFP, including information subsequently disclosed by Children's Friend during the proposal process, shall be considered confidential and should not be released to outside parties. This document represents a request for proposal only and in no way should be construed as a contract or letter of intent.

## **13. RFP Amendments**

Children's Friend reserves the right to request clarification on any proposal or to ask respondents to supply any additional material deemed necessary to assist in its evaluation. Children's Friend reserves the right to change the RFP schedule or issue amendments to the RFP at any time. Children's Friend also reserves the right to cancel or reissue the RFP.

## **14. Rejection of Proposals**

Children's Friend reserves the right to reject any or all proposals, to waive any minor informalities or irregularities contained in any proposal, and to accept any proposal deemed to be in the best interest of Children's Friend.

## **15. Proposal Validity Period**

Submission of a proposal will signify the vendor's agreement that its proposal and the content thereof are valid for 180 days following the submission deadline and will become part of the contract that is negotiated between Children's Friend and the successful vendor.

## **16. Disclaimer**

Children's Friend reserves the right to share, with any consultant of its choosing, the RFP, and any resultant proposals to secure expert opinion.

## **17. Non-Obligation**

Receipt of proposals in response to this RFP does not obligate Children's Friend in any way. The right to accept or reject any proposal shall be exercised solely by Children's Friend. Children's Friend shall retain the right to abandon the proposal process at any time prior to the actual execution of a contract with a vendor, and Children's Friend shall bear no financial or other responsibility in the event of such abandonment.

## **18. Public Disclosure**

All materials provided to Children's Friend by vendors are subject to State and Federal public disclosure laws.

## **19. Thank You**



Children's Friend looks forward to reviewing your response and would like to thank you in advance for your participation. The Development Consultant Engagement is very important to our continued success and represents a major focus of effort for Children's Friend. We appreciate and value your input, expertise, and feedback.

# Attachment A

## Vendor Certification

On behalf of the Vendor the individual signing certifies that:

1. They are authorized to contract on behalf of the Vendor.
2. The Vendor is not involved in any agreement to pay money or other consideration for the execution of this agreement, other than to an employee of the Vendor.
3. The prices in this proposal have been reached independently, without consultation, communication, or agreement, to restrict competition.
4. The prices quoted in this proposal have not been knowingly disclosed by the Vendor prior to an award to any other Vendor or potential Vendor.
5. There has been no attempt by the Vendor to discourage any potential Vendor from submitting a proposal.
6. That the Vendor is an experienced development/fundraising professional.
7. They have read and understand all the information in this Request for Proposal.
8. The Vendor, and any individual or staff members to undertake or be assigned to the project, does not have a record of substandard work and has/have not been debarred or suspended from doing work with any federal, state or local government.

Dated this \_\_\_\_\_ day of \_\_\_\_\_, 2024.

\_\_\_\_\_  
Vendor's Firm Name

\_\_\_\_\_  
Printed Name and Title of Individual Signing

\_\_\_\_\_  
Signature of Vendor's Representative

# Attachment B

## EQUAL OPPORTUNITY AND NON-DISCRIMINATION

**This contractor and subcontractor shall abide by the requirements of 41 CFR 60-1.4(a), 41 CFR 60-300.5(a) and 41 CFR 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, sexual orientation, gender identity or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability or veteran status.**

\_\_\_\_\_ is committed to promoting equal employment opportunity through progressive program designed to provide equal opportunity without regard to race, color, sex, religion, national origin, age, disability, or political affiliation or belief. (Name) takes positive steps to eliminate any systematic discrimination from personnel practices.

\_\_\_\_\_ recruits, hires, trains, and promotes into all job levels the most qualified persons without regard to race, color, religion, sex, national origin, age, or disability status. Staff at all levels are responsible for active program support and personal leadership in establishing, maintaining, and carrying out an effective equal employment opportunity program.

\_\_\_\_\_  
Name of Organization

\_\_\_\_\_  
Signature of Authorized Representative Date

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name and Title of Authorized Representative