

Request for Proposal

Fundraising Consultant for an

Endowment Campaign

A campaign to help more middle and high school students prepare for college with focus, confidence and enthusiasm

**ISSUE DATE: January 7, 2019**

**RETURN DATE: February 11, 2019**

**FUNDRAISING CONSULTANT for an Endowment Campaign**

**REQUEST FOR FUNDING**

Crosby Scholars Community Partnership is requesting submissions from fundraising consultants interested in managing an Endowment Campaign to raise the money needed to support existing programs, expand scholarship funds and increase staff to accommodate the tremendous growth of the Program. The amount needed is estimated to be 7 million dollars to build organization capacity in order to sustain proven youth development services in Forsyth County.

The purpose of this Request for Proposal is to retain a Fundraising Consultant who will 1) design a campaign plan and identify key leadership 2) manage the implementation and launch of the campaign 3) track progress and ensure the campaign remains a priority for the organization.

**ESTIMATED TIMELINE**

**PHASE 1 - Campaign Assessment and Plan** (January 1 – June 30, 2019)

* Conduct confidential interviews with top prospects.
* Refine internal capacity and needs including staff and volunteer requirements.
* Develop campaign plan and calendar.
* Support development of a case statement.
* Work with Board and Capital Campaign Committee to develop budget.
* Board and Staff education and training.

**PHASE 2 - Campaign Implementation and Launch** (July 1 – August 31, 2019)

* Assist in developing collateral materials for launch of the Capital Campaign.
* Identify donors by Constituency, create individual Donor Packet.
* Set goals (Gift Charts), develop fundraising strategy and timing.
* Donor stewardship and cultivation.
* Capital Campaign relationship with organizational fundraising.
* Develop campaign events.
* Donor recognition and naming opportunities.

**PHASE 3 - Campaign Management** (September 1 – to Completion)

* Focus on active cultivation and solicitation of major gift prospects.
* Assist with proposals to national foundations and corporations.
* Manage the public information and public relations plan.

**CROSBY SCHOLARS PROGRAM BACKGROUND**

As a partnership of the Winston-Salem/Forsyth County Schools, the Winston-Salem Foundation, the United Way and the Kate B. Reynolds Charitable Trust, the Crosby Scholars Program is a nonprofit college access organizationthrough which students begin to prepare academically, financially, and personally for successful college admission as early as middle school. With a 26-year history of providing academic training, financial aid and college application workshops, advisory services, college tours, and “last-dollar” scholarships, Crosby Scholars now serves more than 11,600 public school studentsannually.

Crosby Scholars attend Saturday Academies which includes such topics as anger management, speech and communication, goal-setting, time management, test taking and study skills, and preparing for college. Additionally, Crosby Scholars perform community service, commit to remaining drug free, meet with advisors for college planning, and agree to follow all school rules and regulations. Students completing the program may apply for scholarships for college.

Today, as higher education becomes increasingly competitive and expensive, students and parents in Forsyth County need the inspiration and expertise of the Crosby Scholars Program to ensure that every qualified student has the opportunity to attend college. Access to college enrollment is an important factor not only in the lives of individual youth, but in the life of our community as well. Providing workshops and mentors to encourage well-balanced, goal-oriented young people helps build community capacity by addressing such issues as workforce development, drug abuse prevention, and volunteer involvement. Further information is available by visiting our website as [www.crosbyscholars.org](http://www.crosbyscholars.org).

**Other information you may find pertinent to a final decision:**

The Crosby Scholars Program graduates 100% of the seniors who participate in the program and 98% of the students continue their education at a two-year or four-year college upon high school graduation. Students may join our program as early as 6th grade and may continue through college graduation. Open to any student attending a public middle or high school in Forsyth County, Crosby Scholarsseeks an enrollment that proportionately mirrors the school system’s demographic diversity.

Through increased community awareness and a policy of “open door” recruitment, the program supports and prepares students of every background while actively engaging those in under-served and under-represented populations. (Of the 695 students awarded the *Last Dollar* *Grants* for the 2018-19 school year, nearly 64% qualified for a Pell grant.  The Pell grant is the federal financial aid program reserved for the neediest students in the country.)

A valuable resource for allstudents, the program is clearly a lifeline of opportunity to some. Without the dedicated mentoring, support, and structure offered by Crosby Scholars and our Senior Advisor Program, many bright, capable students from Forsyth County would not enroll in college much less experience the life-transforming possibilities of higher education.

Since 1993, the Program has awarded more than $64.2 million in Last Dollar Grant, and leveraged an additional $29 million from other sources. Last year, Crosby Scholars performed more than 119,000 hours of community service. Many of our Crosby Scholars have returned to volunteer to help other Crosby Scholars go to college. We work to help students graduate from high school and remove barriers to college enrollment and college graduation.

**Funding** is the organization's greatest weakness, due to its history of dependence on one event which has closed, CROSBY National Celebrity Golf Tournament. In 2005, Sara Lee retired President, Paul Fulton, lead the effort to stage the first “mini-reincarnation of the Crosby which is now the organization’s only fundraiser. This event still continues to net $300,000 for the one day tournament.

**Funding: Past and Future**

In 2012, the Board of Directors of the Crosby Scholars Community Partnership launched the “Your Investment. Our Promise. A Campaign for Our Community.”This capital campaign raised $5.2 million in new dollars needed to expand student services and Last Dollar Grant scholarship funds to support the projected 10,000 Crosby Scholars by 2015, a number actually reached in 2016. The successful campaign allowed the organization to:

* Broaden student services to support the increasing number of students,
* Increase the number of Last Dollar Grants (LDG) awarded,
* Extend outreach to underserved Hispanic and African American male student populations,
* Expand the grade advisor and senior advisor programs through the addition of full-and part-time staff,
* Enhance management of the organization by hiring Finance and Development professionals.
* Continue to increase participation in the program across all schools served in Forsyth County.

Goals for our next capital campaign will include:

* Raise $7 million to augment funding of Program operations and to fund Last Dollar Grants for the next five years.
* Increase enrollment and retention of students in Title I schools.
* Continue to expand outreach programs to Hispanic and African American male student populations.
* Expand STEAM-related programming in both middle and high schools.
* Increase the number of first generation students enrolling in 2- and 4-year colleges.
* Improve the LDG program so that it reaches more students in need.
* Enhance the Program’s workshops in academic skills, leadership development, college admissions counseling, SAT/ACT preparation, and financial aid planning.

**SCHEDULE AND TIMING**

The Board and staff are considering an ambitious timeline for launching the campaign. As part of your response to the RFP, please include feedback on feasibility of this timeline. Our proposed schedule is:

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| *January 7, 2019*  | *RFP issued* |
| *February 11, 2019*  | *Proposals due by close of business* |
| *February 25 & 26, 2019*  | *Presentations to Crosby Scholar Selection Committee* |
| *March 1, 2019*  | *Presenters notified of decision by letter* |
| *March 4, 2019*  | *Campaign planning with staff and Board begins* |
| *March 14, 2019* | *Presentation of campaign plans to Board of Directors. Approval by Board for endowment campaign.* |
| *September 1, 2019* | *Campaign launch.* |

**PROPOSAL FORMAT AND REQUIREMENTS**

Please address the following topics. You may submit additional information, but only the proposal itself will be submitted initially to the Selection Committee. Other material will be supplied at their request. Proposals addressed to Crosby Scholars Community Partnership, Mona Lovett, Executive Director, and 2701 University Parkway, Winston-Salem, NC 27105 or emailed to mwlovett@crosbyscholars.org will be received until 5:00 p.m. on January 7, 2019.

**BACKGROUND**

* Services provided by you relative to an endowment campaign.
* Experience with similar projects (type of organization, size of community, etc.)

**ADMINISTRATION, ORGANIZATION, PRICING & STAFFING**

* Describe your campaign process. What distinguishes your processes and approach from those of others?
* Provide a proposed implementation schedule.
* What information and recommendations will be included in the campaign plan?
* What will you charge to conduct this campaign?
* What is the consultant’s role and responsibilities during the campaign?
* What are your expectations of our organization’s board and staff during the campaign process? Provide information regarding the resources and involvement that you will require from us.
* Provide any other services that may be considered as an added value to the Crosby Scholars Program.

**TRACK RECORD AND REFERENCES**

* Please provide us with a client list within the past five years.
* Are you presently doing any work in the Triad area? If so, who and where? What makes you “right” for us, and better than other individuals we could select?
* Provide information regarding your knowledge/experience of/with educational non-profits.
* Please provide us with three client references we can contact including name, title, organization and telephone number.
* Provide a sample of previous work related to carrying out an endowment campaign.

**STAFF DEVELOPMENT**

Staff development is always a highly valued objective of Crosby Scholar and we view this campaign as an excellent learning vehicle for our Board, staff and development professionals.

* If we retained you for the campaign, would you be willing to offer your advice, guidance and assistance to our staff to help them with other fundraising activities?
* What additional fees would be required?

**QUESTIONS**

For additional information, please call or email:

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