REQUEST FOR PROPOSALS

Fundraising and Communications Capacity and Audience Analysis and Tactical Playbook for Unrestricted Revenue Growth

ORGANIZATIONAL OVERVIEW

The Alliance for the Chesapeake Bay (the Alliance) is a regional nonprofit organization founded in 1971 that restores the lands and waters of the Chesapeake Bay watershed. Our collaborative and action-oriented approach delivers on-the-ground solutions, provides technical assistance, and builds capacity to achieve healthier lands and cleaner water.

Our staff of approximately 75 individuals works across multiple regional offices and program areas, including Agriculture, Forests, Green Infrastructure, and Stewardship & Engagement. Download the Alliance's 2023 - 2028 Strategic Plan here.

BACKGROUND

Over the last several years, the Alliance has grown rapidly, primarily by securing direct program funding from government grants and other public sources. To ensure long-term financial sustainability, there has been a strategic focus on diversifying revenue streams and increasing unrestricted revenue.

Through our 2023 - 2028 Strategic Plan, we established a goal to reach $2M in annual unrestricted revenue by 2028. Our current unrestricted revenue is approximately $650,000 annually.

Key Context:

- **Preexisting Research:** The Alliance has already conducted extensive strategic work and investments in our Development and Communications capacity since 2021. However, no feasibility study has been conducted for the $2M/year fundraising goal within the latest Strategic Plan.
- **Current Staffing:** The Alliance has a dedicated Development Team, supported in various ways by our Communications and Program Teams. The Alliance's Board of Directors also has a direct role in fundraising. Assessing the capacity of each of these roles in the fundraising function is considered as part of this RFP.
- **The Goal:** We are seeking the "playbook" that outlines the specific, tactical steps required to bridge the gap from $650K to $2M in annual revenue.

The Alliance anticipates that the contract, as a result of this RFP, will be awarded in March 2026. The work described herein should be completed by December 31, 2026.

ALLIANCE for the Chesapeake Bay

SCOPE OF WORK

The consultant will collaborate with the Alliance's Development and Communications Directors, CEO, Board of Directors Development Committee, and other staff members on a multi-phase project outlined below. The scope described below represents the minimum requirements. The final scope, approach, and timeline will be finalized in the project workplan of the successful offeror after award and be consistent with the Contractor's proposal.

Project Kickoff: Workplan Development

- **Project Kickoff and Workplan:** The Contractor shall conduct a project kickoff meeting with the Alliance staff and Board of Directors Development Committee and submit a finalized project workplan that includes the project timeline, roles and responsibilities, key milestones, data needs, and other information required by the contractor. The workplan shall be based on the draft submitted with the proposal, which incorporates the approach and best practices identified in the Contractor's proposal. The final workplan should be submitted to the Alliance for review and approval within one (1) week of contract award.

Phase 1: Synthesis and Feasibility Study

- **Analysis of Existing Data:** Review and incorporate preexisting strategic work in audience research and prospecting. Update gaps as necessary by researching and analyzing the Alliance's audiences (individual donors, volunteers, foundations, and corporations), geographic markets, and similar nonprofits.
- **Feasibility Study:** Conduct a feasibility study of the $2M/year fundraising goal.

Phase 2: Audience Analysis and Strategy Refinement

- **Revenue Scaling Analysis:** Conduct a gap analysis to identify specific strategies and a timeline for reaching the unrestricted revenue goal identified in the feasibility study.
- **Fundraising Communication Strategy:** Document the most common "donor journeys" and recommend fundraising communication strategies, including messaging, materials, and tactics tailored to identified audience segments and designed to move them from awareness to giving.
- **Organization-Wide Capacity Review:** Analyze the current capacity of the Alliance's staff and Board. The goal is to identify how the Board and the Development, Communications, and other teams contribute to the donor journey and where bottlenecks exist.
- **Review of Findings:** Collaborate with Alliance staff and the Board Development Committee to review findings and a preliminary analysis before moving to Phase 3, ensuring recommendations are realistic, relevant, and achievable. This should be documented in the Audience Analysis & Strategy Refinement Report.

Phase 3: Tactical "Playbook" and Training

- **Tactical Playbook:** Develop a concrete, step-by-step fundraising playbook for revenue growth, including internal investments, priority audience outreach and donor recruitment strategies, prospects, and more. This is the "playbook for execution." Recommendations should be based on Phase 2 findings as well as realistic, relevant, and achievable.
- **Fundraising Case for Support:** Based on market research and feasibility study, prepare specific recommendations for messaging and marketing strategies to reach donors at each level of the fundraising funnel aligned with the tactical playbook.

- **Capacity Recommendations:** Prepare capacity building recommendations for Alliance Board, staffing, and/or infrastructure necessary to achieve fundraising goals.
- **Board Training:** Develop and deliver fundraising training for the Board of Directors in support of the new tactical approach, utilizing or adapting existing materials as needed.

DELIVERABLES & SCHEDULE

The table below summarizes the anticipated deliverables and an example schedule for this project. These deliverables represent minimum requirements, and the final scope, timing, and approach will be confirmed in a mutually agreed-upon project work plan that incorporates the Contractor's proposal.

Phase	Deliverable	Description	Example Dates
Project Kickoff	Project Workplan	Finalized project workplan, including timeline, roles, and data needs. The final project workplan will include identified best practices from the proposal.	Week 1
Phase 1	Feasibility Study Report	Feasibility assessment of the $2M annual fundraising goal, including assumptions, risks, opportunities, and timeline. The feasibility study should include a summary of existing audience research, prospecting data, and prior strategic work, including identified gaps.	Week 6
Phase 2	Audience Analysis & Strategy Refinement Report	Consolidated report summarizing revenue scaling gap analysis, donor journey mapping, fundraising communications strategy, organizational capacity assessment, and findings review with Alliance staff and Board Development Committee.	Week 13
Phase 3	Fundraising Playbook & Capacity Package	Tactical fundraising "playbook" with case for support and capacity recommendations, as well as Board fundraising training materials.	Week 20
Final	Final Deliverables Package	Incorporation of Alliance staff and Board Development Committee feedback and submission of final versions of all deliverables.	Week 21

PROPOSAL REQUIREMENTS

Offerors shall submit Technical and Price Proposals. Qualified consultants will have demonstrated experience assisting nonprofits in developing compelling communications and raising unrestricted gifts from individuals, foundations, and corporations. Experience with regional and/or environmental nonprofits and familiarity with the Alliance's service area are both strongly preferred. If LLMs/AI will be used, provide specific examples and justification for each use case. Consultants must be based in the United States.

The **Technical Proposal** shall include:

- **Draft Project Workplan:** A draft workplan outlining the proposed approach to implementing the project, including key activities, timeline, and roles. The workplan must meet the minimum requirements of this RFP and should also reflect the Offeror's recommended best practices and proven strategies relevant to the proposed scope of work. The draft workplan shall not exceed three (3) pages.
- **Company/Consultant Qualifications:** Biographical information for the proposed consultant(s), provided in the form of a resume/company profile or similar document, not to exceed two (2) pages.
- **Professional References:** Contact information for three (3) professional references for similar work conducted by the consultant, including client name, project description, and contact details.

The **Price Proposal** shall include a Price Proposal that summarizes the total proposed cost for the project. The budget shall be broken out by project phase and include sufficient detail to demonstrate price reasonableness and alignment with the proposed scope of work. The total available budget for this activity is $50,000 and offerors should not exceed this amount.

EVALUATION CRITERIA

The Technical Proposal will be evaluated based on the Offeror's approach, qualifications, and experience, while the Price/Budget Proposal will be evaluated separately for reasonableness and alignment with the proposed scope of work. Proposals will be evaluated on relevance to this RFP using the following criteria:

- **Draft Project Workplan**: Quality and feasibility of the draft project workplan, including understanding of the scope, the Alliance's mission, geography, and current staff capacity; proposed activities, timeline, and roles; and incorporation of best practices and proven strategies.
- **Qualifications and Experience:** Relevance and strength of the consultant's qualifications and experience performing similar work, including professional reference feedback for similar projects.
- **Price Reasonableness**: Reasonableness of the proposed price in relation to the scope of work, including alignment with project phases and compliance with the $50,000 budget ceiling.

SUBMISSION INSTRUCTIONS

Please submit proposals to Morgan Goad, Development Director, at mgoad@allianceforthebay.org by Sunday, February 15 at 11:59 PM EST. Interested consultants may inquire for additional information in order to develop a compelling proposal.