

TRANSFORM



REQUEST FOR QUALIFICATIONS Fundraising Consultant

SUMMARY: TransForm seeks an experienced fundraising consultant to work with us from early September through early-November 2010 to: 1) conduct an audit of our current fundraising activities; 2) lead the creation of a 2011 annual fundraising plan; 3) lead the creation of a five-year fund development plan. The consultant's work will be strongly supported by TransForm's development staff.

ABOUT TRANSFORM: TransForm works to create world-class public transportation and walkable communities in the Bay Area and beyond. In our thirteen-year history, we have won literally billions of dollars and groundbreaking policies in support of public transportation, smart growth, affordable housing, and bicycle/pedestrian safety.

We have launched innovative, model programs like our urban Safe Routes to Schools program and GreenTRIP, which certifies new developments that keep the number of parking spaces as low as possible and offer incentives for tenants to drive less. TransForm also opened a Sacramento office last year to have an even stronger voice for world-class public transportation and walkable communities in the Capitol so that California can become a national leader on these issues.

Visit our website to learn more at www.TransformCA.org.

PROJECT NEED: To ensure long-term financial health, TransForm needs to grow our unrestricted reserves and diversify our funding sources. While TransForm's organizational budget has grown quickly over the past few years and is now close to \$3.5 million, this is almost exclusively due to restricted foundation grants and government contracts. Our reserves are a fraction of what they should be given our budget size and the precariousness of the economy. Individual and corporate gifts make up less than 2% of TransForm's revenue. As such, we must build a strong individual and corporate fundraising program to raise the flexible funds we need to move us into a better financial position.

TransForm is relatively new at pursuing donors in a more consistent and sophisticated way. In fact, TransForm has only had one staff person fully dedicated to individual and corporate fund development for about 16 months and a part-time support person for this position for only six months. However, we have laid important groundwork during this time. We have experimented with various appeals, events, and online efforts and have a growing sense of what works in terms of attracting donors, what our donors like, and who they are. Although our donor base is small, we consistently see enthusiastic responses to our efforts that signal great potential. We also have vastly better systems in place to allow us to track and segment our donor and activist activity using Salesforce.

Now is the perfect time to do the thinking and planning needed to set us on a path for success over the next five years. TransForm is ready to look at where we are now, where we can realistically get to over the next several years given likely capacity, and determine the most effective approaches to reach our long-term goals. We need an experienced fundraising expert to guide us in doing this: someone well-versed in best practices with real-life comparisons to draw from, an analytic and strategic mind, and excitement to help us raise more funds for our work.

PROJECT OUTCOMES: We seek a consultant to lead efforts in the three outcome areas described below. However, we recognize that this is a lot to tackle in a relatively short timeframe. As such, we are eager to work with the consultant who is hired for this project so that we can together further refine the project scope so it is doable, meets our needs, fits within our budget, and meets your compensation requirements (see below). Our greatest time challenge is that our Board of Directors will pass a strategic budget in November and we need the five-year fund development plan to be fleshed out enough so that we can have realistic fundraising revenue goals to include in it.

Outcome #1 – Analysis and recommendations regarding:

- The productivity and effectiveness of our past and current fundraising activities and strategies (including events). What's worth building on and what has limited potential? How do these compare with industry standards?
- Potential fundraising activities we should consider, their likely returns, and what resources would be necessary to carry them out (including costs and staff time).
- How TransForm's fundraising compares with organizations of similar age, size, and scope.
- What current donor retention looks like, e.g. gift increases/decreases, and attrition of our existing donor base.
- What TransForm is using for membership levels and if this is the most effective breakdown.
- Who TransForm is currently considers to be a "major donor" and if we should rethink this now given our current donors and prospects, plus when and how we rethink this farther down the line.
- Our readiness for growth in terms of: the current development team's capacity and structure; organizational capacity and structure (e.g. other staff, executive leadership, and Board of Directors); and systems.
- Other issues that may impede TransForm's ability to fundraise and suggestions for ways to resolve these issues.

Outcome #2 - A 2011 annual fundraising plan to include:

- Financial goals that are realistic based on: 2009 and 2010 fundraising results; likely capacity and prospects in 2011; and relevant internal strengths and weaknesses plus external opportunities and threats.
- Chart of gifts needed to meet fundraising goals based on gift size, # of prospects, current prospects, prospects needed, and size of gift.
- Proposed fundraising activities with revenue goals and likely expenses (including staff time) with staff and Board roles defined.
- Additional benchmarks to track throughout the year.
- Month-by-month likely revenue schedule by source.
- Cultivation/retention strategies and objectives (who will we cultivate, how, and when?), including a month-by-month donor contact grid.
- Solicitation strategies and objectives (who will we ask, how, and when?).
- Acquisition strategies and objectives (how and when will we be actively increasing the number of contacts we have?).

Outcome #3 - A five-year fund development plan to include:

- Yearly financial goals.
- Organizational development model for building our fundraising capacity over time, including:
 - Optimal mix of fundraising activities to maximize returns given their staff time required, cost, risk, etc.
 - When and how we'll institutionalize staff and Board involvement in fundraising (including potentially establishing a "philanthropy committee" within the Board).
 - What the development staffing would look like.
 - If, when and how we'll grow a corporate gift base.
 - How our size and segments of donors will grow: how will we transition increasingly towards major gifts and how long this will take? How will considerations of who "major donors" are change over time?
- How, when, and who will monitor progress and evaluate performance.

While the consultant would lead these efforts, they will work closely with and be strongly supported by the Development and Events Manager and the Communications and Development Director. We would also seek the consultant to guide us and/or participate directly in engaging staff and Board at key stages in the audit and planning processes.

PLEASE INCLUDE THE FOLLOWING IN YOUR RESPONSE:

- How long you've been doing this type of work, including how many clients you've served.

- Contact information for at least three organizations you have worked with in a similar capacity, plus a description of these organizations in terms of size, capacity, mission, and how your work with them might apply to us.
- A sample fundraising plan/s that was the result of a process you led. Ideally this would include a one- and four- or five-year plan. We understand many organizations' plans are confidential, so feel free to make anonymous with a pseudonym if needed.
- Background on your experience as a fundraiser in practice.
- Your availability September through November, plus a brief overview of how you would break down the work temporally to complete the three outcomes.
- Anything else you feel would help us understand why you're interested in and the right fit for this project.

Compensation for this work is competitive and based on qualifications. Please provide a cost proposal for delivery of the services described above and a brief explanation of how you arrived at the proposed cost. Also identify likely reimbursable expenses for this project (travel, etc.).

Please email your response and accompanying materials (ideally bundled as a single PDF file) with the subject line of "RFQ Response" to Susanna Handow at susanna@TransFormCA.org. Interviews could begin as early as the week of August 16, 2010. If you will be on vacation for any parts of August, please give us a heads up in your materials.

This Request for Qualifications will remain on TransForm's website until the position has been filled.