America250.org, Inc.

Fundraising Services
Request For Proposal (“RFP”)
RFP number: A250-2024-04-001

Key dates:

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1: Introduction

The America250.org, Inc. (“A250”) is requesting proposals from highly experienced firms that focus on philanthropy, fundraising, and development services, to assist in nationwide fundraising efforts in support of our Nation’s Semiquincentennial (250th Anniversary), which culminates on July 4, 2026. A250 requests proposals and plans from seasoned fundraising firms with comprehensive experience including their own leads and contacts across various donor segments (corporations, individuals, foundations). The RFP will be posted on the America250 website (www.america250.org), and we welcome a wide range of prospective vendors, from larger firms to smaller agencies.

A250 intends to find a vendor that will become an integral part of its development and fundraising arm supporting short and long-term fundraising goals and donor cultivation efforts and to provide strategic guidance from July 2024 - June 2025, with the possibility of extension for additional terms.

All proposals must include the firm’s capabilities, previous experience, specific approach, fundraising philosophy, list of current State registrations as a professional solicitor (or relevant definition per State law signifying the direct solicitation to citizens in that state) and focus areas. Firms are encouraged to provide examples of collateral they have produced, firm financials, and an overall company profile, including staff demographic information.

Documents Provided by A250 in RFP Exhibits:

1. A250 Board Members & U.S. Semiquincentennial Commission Commissioners
2. 2023 990 Report
3. Top Priorities & Timeline

2: America250 Background and History

The U.S. Semiquincentennial Commission (the “Commission”), together with A250 (combined “America250”) is a nonpartisan initiative working to engage every American in commemorating and celebrating the 250th anniversary of our country. It is spearheaded by the congressionally appointed Commission and its nonprofit supporting organization, A250. This multi-year effort kicked off with America’s Invitation on July 4, 2023: a national public engagement campaign inviting all Americans to share their stories and their hopes and dreams for the future of this country. Until July 4, 2026, America250 is working to provide opportunities for all Americans to pause and reflect on our nation’s past, honor the contributions of all Americans, and look to the future we want to create for the next
generation and beyond. From sea to shining sea, from the pre-revolutionary era to today, America250 will engage states, territories, tribal nations and organizations, communities across the country, and millions of friends worldwide. Further, the legislative charge of the Commission through Public Law 114-196 is to emphasize the planning of events in locations of historical significance to the United States, especially in those locations that witnessed the assertion of American liberty, such as— (i) the 13 colonies; and (ii) leading cities, including Boston, Charleston, New York City, and Philadelphia; and (B) give special emphasis to— (i) the role of persons and locations with significant impact on the history of the United States during the 250-year period beginning on the date of execution of the Declaration of Independence; and (ii) the ideas associated with that history, which have been so important in the development of the United States, in world affairs, and in the quest for freedom of all mankind.

America250 continues planning its multi-year-long commemorative activities leading up to the Semiquincentennial. In July of last year, America250 launched America's Invitation, a national public engagement campaign inviting all Americans to share their stories, hopes, and dreams for the future of this country. In December, America250 and local elected leaders participated in the 250th anniversary of the Boston Tea Party, launching a weekend of commemorative activities, including a live reenactment of the Boston Tea Party, which represents the first of many locally-driven, grassroots events that America250 will support in partnership with states and territories across the country. In March 2024, the Commission approved the first iteration of the Playbook of Tentpole Programs, which contains several national programs across a variety of interests that will be executed across the country to help ensure this is the largest, most inclusive commemoration and celebration in 250 years.

3: Scope and Objectives

Key business objectives of RFP Performance July 2024–June 2025

Our objective is to raise the necessary funds to ensure our nation's first 250 years are celebrated, honored, commemorated, and reflected in a diverse scope of events, programs, and partnerships.

America250's key initiative continues to be to invite all Americans to participate in the largest and most inclusive commemoration in U.S. history. To achieve this, we must utilize the power of philanthropy and engage a wide range of Americans and friends of America to support this once-in-a-generation milestone. America250 seeks to secure a vendor to assist in the overall development strategy and fundraising campaign coordination and execution. The vendor(s) will assist in the creation, implementation and execution of the development strategy and identify a pipeline of prospective donors and partners and work in soliciting, cultivating and securing donors. To support and grow our national fundraising efforts, we
seek a vendor to solicit in-kind and cash donations. A250 seeks a vendor, with the appropriate Charitable State Registrations, in identifying and securing High Net Worth Donors (HNWD), corporations, foundations, and other related funding sources, as well as to develop and launch campaigns targeting more grassroots contributions from the American public.

**Individual Donors Management**

- Identify and create a pipeline of prospective donors unknown to A250.
- Coordinate meetings between donors and America250.
- Develop solicitation strategies.
- Work with our managed services / professional services team (PST) teams to develop appropriate fundraising collateral.
- Schedule major donor calls, prepare board members, Commissioners and senior staff for calls/meetings.
- Identify and approach potential sponsors, donors, and granters.
- Establish and maintain a highly engaging individual donor cultivation and gift stewardship program to identify and increase new donors and to increase giving levels of existing donors.
- Complete prospective donor research and briefing materials for donor calls and meetings and manage all correspondence and reporting to prospects and donors.
- Make introductions and schedule meetings for the Chair, Commissioners, Commission Executive Director and A250 Executive Vice President and prospects.
- Cultivate and maintain a pipeline of donors and communication processes.

**Institutional Fundraising**

- Work closely with America250 to identify areas of organizational need.
- Identify, coordinate, and approach funding including in-kind possibilities around America250’s Playbook of Tentpole Programs.
- Lead the writing, preparation, and submission of public, private foundation, and corporate letters of inquiry, proposals, and submissions, including drafting high-quality, creative, engaging cases for support, incorporating relevant research.
- Monitor financial administration of grants to ensure that proper documentation is submitted for expenditures and that requests for funds are made within the time limitations specified.
- Develop fundraising strategies to harness existing relationships and identify and secure new individual donors, and partnerships with corporations and foundations.
- Actively engage in ongoing prospect research that identifies funding opportunities.
- Maintain the America250 Funding Directory, working with State and Territory Commissions and National Resource Partners on their program submissions.
Key Deliverables/ Expected Outcomes from the Service

(See Exhibit C for Priorities & Timeline):

- Ability and experience in engaging in the markets identified in the Commission’s authorizing legislation and at a national scope.
- Identify, create, develop and solicit a robust pipeline of prospects, donors, and diverse segments of Americans across the US and worldwide (consistent with U.S. law).
- Identify and engage companies to use their experience, skills, and expertise to support the 250th anniversary by securing private funds or in-kind contributions.
- Cultivate and engage America’s philanthropic leaders to help share the story of America and help inspire the next generation of leaders and philanthropists.
- Set up meetings for the Chair, A250 Board, and U.S. Semiquincentennial Commission with key prospects, develop a strategy for outreach, and engage with identified potential donors.
- Assist with prospect identification, evaluation, and stewardship.
- Establish levels of giving with benefits.
- In conjunction with the America250 staff and Managed Services Team support donor events, programs, and other key external donor-facing events.
- Report on potential fundraising asks, and secured funding as reflected in the A250 development funding thresholds.
- Maintain in-kind giving data.
- Support the creation of the Commission’s annual report to Congress and the President.
- Provide updates in writing and verbally at the Semiquincentennial Commission meetings.
- Ensure all follow-up reporting, thank you letters and benefits are received by the donor according to the agreement.

Initial Period of Performance: July 2024–June 2025

A250 anticipates issuing a contract for this work on or about July 15, 2024. All final services and deliverables under contract for the 2024-2025 services must be completed and delivered by June 30, 2025.

The initial contract award will be through June 2025 with the opportunity for annual renewal based on successfully meeting performance goals.
4: Small, Diverse, and Women-Owned business participation:

America250 supports diversity, equity and inclusion in its vendors and as a means to help accelerate economic growth in our local communities through the engagement and empowerment of high-quality and cost-competitive small, minority-owned, women-owned, LGBTQ+-owned, veteran-owned, service-disabled veteran-owned, person with disability-owned or indigenous person-owned. A250 encourages vendors, suppliers, contractors, and service providers to facilitate the participation of such businesses through partnerships, joint ventures, subcontracts, and other inclusive and innovative relationships.

5: Business Designation

See Exhibit A for respondents to complete and attach to the proposal response. Any partners, subcontractors, or other entities intended to be used during the contract period must also complete Exhibit A and be included in the proposal response.

6: Minimum Qualifications

Respondents shall have the following minimum qualifications to be considered eligible to propose in response to this RFP. It is the responsibility of the Respondent to ensure and certify that it meets the minimum qualifications. Respondents not meeting all the following criteria will not have their responses considered for selection. Vendors cannot be suspended or debarred from providing services to the U.S. Government (i.e., authorized in the System for Award and Management (SAM.gov)).

- All vendors submitting a final bid must:
  - Be licensed to do business in the United States and in every state and territory requiring direct solicitation firms to be registered and bonded, if also required
  - Upon A250’s issuance of a Notice of Intent to Award to the successful Respondent, said respondent will agree to execute the contract and provide all required insurance and payment information and performance bonds, if any, within fifteen (15) business days or such longer period that A250 deems reasonable.
  - Have ample expertise in fundraising services, a valid business license, necessary resources, and experience in managing similar projects of this scale in previous work history
  - Maintain and provide sufficient staff time and resources to ensure timely work performance
  - Provide examples of experience assisting with multi-million dollar campaigns
  - Share examples of securing partnerships with Fortune 500-1000 companies
  - Maintain business insurance coverage
  - Provide two references for similar work performed
o Provide a budget and/or targeted costs
o Provide invoicing requirements (i.e. monthly, quarterly)
o Provide other current projects or competing scopes of work being performed (timeline and current state of projects), consistent with relevant confidentiality requirements about those projects
o Respond to each question in Exhibit B fully and accurately

**7: Evaluation Factors for Selection**

In its sole discretion, A250 will evaluate each response based on an assessment of how well each Respondent meets the evaluation criteria listed herein. The criteria will be applied based on the information contained in the response submitted by each Respondent. Therefore, it is in the Respondent's best interest to provide informative, concise, well-organized technical and business information relative to the services that the Respondent is proposing to provide.

**Evaluation Percentages & Scoring:**
- Cost & Budget (40%)
- Vendor diversity is encouraged (10%)
- Proven work history and documented relevant capabilities, including experienced staff and performance with similar projects (Please include campaign size, time period, goal vs. actual raised, and outcomes) (30%)
- Experience working with a diverse segment of donors (ages, cultures, race, gender, income levels, national specific focus) (20%)

**8: Key Proposal Dates and Instructions**
- A250 anticipated engagement start date: July 15, 2024
- Proposal Title: Development/ Fundraising Services
- RFP Number: A250-2024-04-001
- Proposal Manager: kdurante@america250.org

**Key dates:**
- RFP issue date: April 5, 2024
- Questions Due: April 19, 2024
- Response to Questions due: May 3, 2024
- Notification of intent to participate or elect not to participate: May 6, 2024
- Proposals due date and time: June 7, 2024
- Onsite evaluations (if required/ applicable): TBD
Completed proposal:
All responses must reference the RFP Title, and RFP Number noted above. All responses must be made in accordance with the requirements set forth in the Proposal Format section.

Proposal dates:
A250 reserves the right to adjust any RFP dates without notice. Any changes in dates will be reflected on the www.america250.org site. Proposals that arrive late will be rejected. All proposals are due by June 7, 2024, 11:59 PM ET via email to kdurante@america250.org.

Proposal cost:
The Respondent is solely responsible for the cost of preparing and delivery of its proposal.

Participation:
Please send an email to the Proposal Manager, Kay Durante, by May 6, 2024, with your intent to participate, or election not to participate, in this RFP.

Questions:
Please submit questions related to this RFP to the Proposal Manager, Kay Durante, via email no later than April 19, 2024. All questions and answers will be sent to Respondents or posted on the America250 website. Respondents are encouraged to pay close attention to any posted clarifications.

Contact with an America250 employee or contracted consultant regarding this RFP other than the Proposal Manager, or an individual designated in writing by the Proposal Manager, will result in the disqualification of the Respondent. Normal business contact with America250 employees is permitted, exclusive of discussion of this RFP.

9: Submission requirements

Response acceptance:
Responses must be valid for a minimum of 120 days following the due date. At the conclusion of this RFP, A250 will continue discussions with only those Respondents that we believe can meet our short- and long-term objectives. A250
has the right to accept or reject any or all responses. Responses must include cost and terms of the services. The proposal will be considered received by the Proposal Manager at the time the electronic copy is received.

Response forms must be submitted in Microsoft Word, PDF, or Excel format. Failure to submit your responses in this manner may result in disqualification. All material in this RFP is considered proprietary and shall not be used by the Respondent or any of its employees, representatives, or potential subcontractors for any reason other than for responding to this RFP.

Confidentiality:

All material in this RFP is considered CONFIDENTIAL and shall not be used by the Respondent or any of its employees, representatives, or potential subcontractors for any reason other than for responding to this RFP.

All work products developed as part of this Work Made for Hire agreement are considered CONFIDENTIAL and shall not be used by the Respondent, or any of its employees, representatives, or potential subcontractors for any reason without prior written permission from A250.

Work Product Ownership:

All works created by Contractor for A250 under the awarded contract shall be considered Works Made for Hire under the U.S. Copyright Act, 17 U.S.C. S § 101. As such, all intellectual property rights, including the design and copyright in the work belong exclusively to America250 and nothing shall be interpreted or construed as a transfer, assignment, or license of the work to Contractor or any third party. The Contractor's design shall be original work to ensure that it is free and clear of any intellectual property claims from third parties or any other use limitations.

Ethics:

By signing the response, the Respondent certifies this proposal is made without any previous understanding, agreement or connection with any other person, firm, or corporation submitting a response in reply to this RFP other than as a subcontractor or supplier, and that this response is made without outside control, collusion, fraud, or other illegal or unethical actions.

Reservations:

The RFP is not a contractual offer or commitment by A250 to purchase products or services. A250 reserves the right to reject any or all responses. A250 may reject any responses that it deems incomplete, unclear, or irregular. A250 reserves the right to cancel, postpone, modify, reissue and amend this RFP at its discretion.
Documents, attachments & forms:

The inclusion in this RFP of related documents/forms/attachments shall in no way be construed as an award of a contract for the services described in this RFP, or any portion thereof, or as an intention to award a contract. A250 reserves the right to alter, amend or delete any portion of these forms, to exclude any form, or to require additional forms not listed herein prior to the execution of an agreement.

10: Proposal Format

The Response shall include and address, at a minimum and in the same order as listed, the items listed below. Unnecessarily voluminous submittals are not considered to be beneficial to the process. Rather, clarity and conciseness, while still providing necessary detail, are preferred.

Forms and templates provided in Microsoft Word or Excel format must be submitted in the same format. All RFP responses should have consecutively numbered pages.

- Cover letter (maximum one page)
  - Signed by an authorized representative of the Respondent certifying the accuracy of all information in your information
  - Acknowledge your agreement to be bound by and comply with the terms set forth in this response
- Documentation list:
  - Signed cover letter
  - Proposal addressing requirements listed above, particularly Section 6
    - Submit one (1) electronic copy of the response, including all mandatory attachments, via email. Respondent proposal must include a detailed project timeline that includes milestones, cost associated with each milestone, decision points, assumptions, and resources (America250 and Respondent's)
  - Case studies
  - Responses to Exhibits A and B
  - Cost and terms
  - Include comprehensive list of states and territories where currently registered (and bonded, as required) to engage in direct solicitation for charitable contributions
  - Company Background and Type of Business information from Section 5 of this proposal.
  - References
  - Additional attachments that support the proposal
Exhibit A: Business Designation

Please complete the below as well as expand, as deemed necessary, in your proposal. This must also be completed by any other entity partnering with you or that you intend to use at any point during the contract period.

a. ___ American owned  ___ Foreign owned

b. ___ Public  ___ Private

c. ___ Large business

___ Small business – 250 or fewer employees or average annual gross receipts of $10 million or less averaged over the previous three years.

d. Please check all eligible classifications that describe your business. (if public, skip to section e.)

_____ Women-owned*
_____ Minority-owned*
_____ LGBTQ+ -owned*
_____ Veteran-owned*
_____ Service-disabled veteran-owned*
_____ Person with a disability-owned*
_____ Indigenous person-owned*
_____ Eligible for HUBZone program
Ownership is defined as 51% owned by one or more persons identifying with the above classifications who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more persons identifying with the above classifications who are citizens of the United States or non-citizens who are in full compliance with the United States immigration law, and both the management and daily business operations are controlled by one or more women who are U.S. citizens or legal resident aliens.

e. If public or does not meet any of the classifications in d. above, please describe the business’ diversity programs.

f. Please describe the diversity of the business’ workforce.

Description of subcontractors used (including types of businesses utilized per definitions above).
Exhibit B: Proposal Detail

The following questions are intended to help provide further clarifications to the evaluation committee team. Please answer the following questions in the order presented in this section. Please keep answers brief and straightforward.

- What experience does your company have working with similar projects and government-related nonprofits?
- What is your fundraising approach and philosophy?
- What experience does your company have in creating, building, and developing national fundraising structures and generating new donor pipelines?
- What experience does your company have in securing seven- eight figure-level gifts?
- What experience does your company have in donor cultivation and generating a diverse pipeline of donors (HNWD, Corporations, Foundations)?
- Who will be the specific team members assigned to this project?
- What makes your company unique?
- What are your key competencies and competitive advantages over other companies?
- In what ways does your firm commit to diversity, equity, and inclusion? Please be specific about business practices, ownership, and policies.
- Please provide at least two examples of case studies that utilized features or functionality similar to this RFP's requirements.
- Please provide a potential project budget and a rate card for your services. Please align your costs to the scope and schedule.
- Feel free to add or complement your value proposition with any additional documentation you deem necessary.
Exhibit C: Top Priorities & Timeline July 2024–June 2025

1. Support the creation of fundraising planning and development of donor outreach & engagement strategy with Salesforce integration as CRM.

2. Support the solicitation and securing of diverse funding for FY24-FY25 (individuals, corporations, foundations, HNWD’s, online giving, stewardship plans, giving societies, and donor proposals.)

3. Assist in quarterly and annual reporting with success metrics for Year over Year measuring.

4. Development of donor events and event fundraising plans nationwide.

5. Build fundraising coordination of high-profile donors for separate leadership giving group and advisory board.

6. Identify, solicit and secure sponsorship opportunities.

7. Development of a grassroots fundraising strategy and campaign launch with the American public.