



Request For Proposal

Fundraising Campaign Consulting Services
Steps to Success • P.O. Box 470421, Brookline, MA 02447

PROPOSALS DUE BY: December 29, 2023

Our Mission

The mission of Steps to Success is to promote equity for students from low-income families in Brookline by expanding their horizons, building upon their skills, and supporting their educational journey in order to maximize their life choices.

About Steps to Success

So much of what there is to learn about Steps to Success (STS) starts with our student-centered mission. It's why we lead with it—on our website, in conversations with community partners and donors, to the families we serve (and, yes, even in the Request for Proposals we write.) That's how strongly we believe in it.

Since 2001, STS has served more than 4,500 low-income students from Brookline, providing them with the support they need to thrive throughout their educational journey and beyond. With services and resources like afterschool programs, vacation programs and camp access, career readiness through paid internships and workshops, and college success through advising, mentoring, and financial aid access, STS students and their families gain access to the tools they need to “equal the playing field.” We know that supporting a student wholly involves multiple points of contact and connection with them and their families, so we partner with local organizations that offer housing and other financial resources. STS also offers family education, English language classes, and other direct services.

The majority of the youth STS serves live in Brookline public housing. Most are students of color and/or go on to be first-generation college students. The truth is that our vital programming helps students overcome obstacles that exist through unjust societal systems and policies. STS helps students navigate these systemic barriers, helping to close the opportunity gap that exists between low-income students and their higher-income peers.

We have built deep, trusted relationships with students and their families for more than 20 years—and we love seeing STS alumni go on to accomplish big, impactful things in this world. Our research-driven, student-centered approach makes a difference in the lives of young people.

Project Overview

STS is primed to re-launch a fundraising campaign. In anticipation of the 20th Anniversary of Steps to Success, STS took the first steps to outline, plan, and begin fundraising for a three-year, \$3 million capital campaign to ensure long-term sustainability. Planning for this campaign, in conjunction with a professional consultant, began in the winter of 2021. The Executive Director (ED) and Development Committee (comprised of members of the Board and other volunteers) worked with the development consultant to refine the preliminary campaign goal focusing on the funds needed to expand programming. Together, they created a major gift prospect list and a corresponding giving table, produced a draft Case Statement, and developed early language to approach donors.

By June 2021, Steps had secured several pledges amounting to several hundred thousand dollars, as well as grant revenues earmarked for the campaign. Several lead gifts were confirmed with more prospective gifts in sight when the long-tenured ED resigned from STS to pursue work outside of the non-profit sector. Development Committee members were tasked with continuing the work of prospect list building and ask planning while STS searched for its new executive director. Notwithstanding this challenge, there was sustained commitment and continued enthusiasm for the project. A new ED was named in July 2021 and continued work with the campaign consultant. In conjunction with the Board of Trustees, the goal of the capital campaign was reduced to \$2.5 million, with the dual goals of expanded programming and long-term financial sustainability. During the fall of 2022, due to staffing challenges, the Campaign was put on hold and the ED ultimately left the organization. Without permanent executive leadership from December 2022 to July 2023, the Campaign continued to be inactive.

To date, STS has secured a total of \$456,500 from several individual donors (\$256,500) and grant funding (\$200,000). With our new permanent Executive Director, Nia Jacobs, in place as of July 2023 — we are now prepared to re-launch our campaign and are excited to do so with a strong leader in place. We are looking to partner with a campaign consultant who can confirm or adjust our \$2.5 million goal and provide the necessary strategic campaign planning, major gift management, and fundraising support for us to achieve it.

STS is looking for expertise in fundraising to build on what we've already accomplished. To this end, the ED is open to working with a thought partner to revise the existing plan and materials or create new materials, depending on what may be necessary. The majority of the work will focus on securing major gifts.

The ultimate goal continues to be to raise funds to ensure the long-term financial stability needed to expand STS programs, allowing the organization to continue to make a significant impact on students' success.

Project Goals

By partnering with an experienced fundraising consultant, our goal is to finish the tactical work previously started in order to re-launch the campaign and continue raising money through a variety of gift opportunities.

Campaign dollars will help ensure long-term financial stability for STS while it continues to expand its program. In this expansion, in-school and after-school programs will start earlier for students. Starting in younger grades will help build a strong foundation for students' success. The expansion also extends programming to provide more support and resources to post-college and grad students.

Our hope is that this campaign not only harnesses the generosity of our donors at this moment in time but also helps to build a stronger, wider culture of philanthropy for Steps to Success' work.

The goals include working with a consultant to:

- I. Assess current materials and progress to date
- II. Complete all remaining planning and projections for the campaign, which will serve as a roadmap for both the silent and public phases
- III. Help identify and rate prospects, including individuals/corporations who have not yet contributed and those who finished pledge payments and have the capacity to give again
- IV. Develop or edit materials (i.e. case statement, inserts, pitch packet, etc.) to use with major gift donors
- V. Advise Steps to Success staff members on campaign best practices and provide workflows for prospect ratings, list building, data analysis, etc.
- VI. Develop an overall timeline for the campaign, including appropriate fundraising benchmarks to signal the public phase launch

To reach these goals, Steps to Success is now accepting bids in response to this Request for Proposal.

Scope of Work

We are looking for a true partner to provide services in three areas: overall campaign planning, silent phase tactics (including major gift planning), and public phase launch.

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- Conduct research and review existing materials to confirm the total dollar goal recommendation and overall campaign timeline.
- Prepare concepts for campaign ask packaging (e.g. sponsorships, endowment) and combinations.
- Edit or draft case statement, inserts, and pitch packets.
- Maintain a shared folder with research profiles, strategy/campaign recommendations, and other planning documents accessible in real-time to the Executive Director (ED), development associate, and select volunteer staff members.
- Coordinate with staff on best practices for incorporating prospect lists/ratings/moves into the database.
- Create briefing/report templates for ED and solicitation team members.
- Prepare detailed agenda and lead biweekly meetings with ED and dev. assoc. to promote collaboration and update emerging priorities.
- Participate in monthly meetings with ED, dev. assoc. and Board liaison.
- Provide counsel on any and all fundraising and communications topics as requested by ED/Development Associate.
- Review and revise the previously proposed rating system, corresponding gift levels, and simplified tracking for use with major gift prospects.
- Review and revise, or create anew, a list of top 20 major prospects (i.e. \$10k+/year multi-year or \$25k+ outright) and propose an ask strategy, ask amount, and solicitation team for each prospect.
- Provide revised campaign gift tables and other core planning documents.
- Draft talking points/email messaging for outreach, pitch, and follow-up.
- Propose a coordinated timeline and tasks for the campaign's public launch.
- Create pledge form variations for integration with Steps' year-end appeal and Impact Report.

Target Deliverable Schedule

While our strong hope is to launch the public phase in May 2024, we understand that the timing could be dependent on the above scope of work.

Final Project Due: May/June 2024

STS would like to launch its public phase at its annual celebration event in May 2024 and, with that, the expected project completion date is May/June 2024. If this date needs to be adjusted, please include your readjusted proposed date, as well as your reasoning for shifting the schedule. All proposed date changes will be considered.

Budget Considerations

\$10,000-12,000 total budget, including travel costs, fees, and any other expenditures related to the scope of work. STS is committed to the success of this campaign and willing to invest in the work needed to reach the fundraising goal. That said, as a non-profit organization, every dollar counts. We value the hard work of our partners and also ask that bidders provide a detailed cost breakdown.

Existing Challenges

Leadership Change

As mentioned above, the change of leadership at the start of the campaign caused significant disruption to the planning and execution. There was also a loss of documentation and a lack of cohesion as a result of the turnover. With the full support of members of both the Board of Trustees and the Development Committee, many of whom have been involved since the start of the initial campaign, ED Nia Jacobs is ready to lead the re-launch.

Scope and Messaging

When first launched, the campaign was branded as the Next Steps 20th Anniversary Campaign with a goal to raise funds to expand the program. STS is now several years beyond its 20-year anniversary and very much looking ahead to its long-term planning, financial health, and future as a service provider. The organization has already started exciting expansion of its programs, which leads to a broader scope for the campaign. With the staff transition and reimagined scope, there is a strong need for updated marketing and messaging around the relaunch.

To this end, STS is sending a separate Request for Proposal for campaign communication consulting. If bidders are interested in reviewing and responding to both RFPs, providing a full proposal that includes costs to cover both scopes of work, please reach out to Nia Jacobs at njacobs@stepstosuccessbrookline.org or (617) 713-5310.

Evaluation Metrics

Steps to Success will evaluate potential partners and proposals based on the following criteria:

- Previous experience/past performance history
- Samples and/or case studies from previous projects
- Projected costs
- Experience and expertise
- Responsiveness and answers to questions in the next section

Questions Bidders Must Answer To Be Considered

- I. How is your cost structure broken down?
- II. Considering this is a campaign re-launch, are you comfortable building upon the existing campaign components and suggesting new elements when needed? Have you worked on a re-launch before?
- III. Do you see any gaps in the services requested? If so, can you identify these areas and provide a cost analysis for any additional services you would strongly suggest outside the scope provided?
- IV. Are there early issues or concerns that you need to have addressed?

Submission Requirements

Bidders must adhere to the following guidelines to be considered:

- Only bidders who can meet all five metrics in the evaluation section should submit a proposal.
- Proposals must be sent in by December 29, 2023. We ask that bidders who are interested in submitting a proposal should inform Nia Jacobs, Executive Director, at njacobs@stepstosuccessbrookline.org no later than December 14, 2023.
- Please include samples, where applicable, and professional references with your proposal.
- A proposed schedule must be included and clearly expressed.

What We're Looking For in Potential Partners

If you're still with us and have been reading along, you'll know that, once again, we turn to our mission. We wish to work with vendors who support and understand our mission and who share a passion for education. We seek partners who can provide leadership and big-picture, strategic thinking while also taking on some of the hands-on tasks of running a successful fundraising campaign.

Contact Information

For questions or concerns connected to this RFP, contact Nia Jacobs, Executive Director, at njacobs@stepstosuccessbrookline.org or (617) 713-5310. Thank you!