

**Request for Proposal**  
*Related to Services for*  
**Strategic Planning of an Endowment Campaign**



*An Endowment to Preserve Organizational Culture of Excellence Through  
Leadership The Doc Buchanan Leadership Academy:  
Building Leaders the Clovis Unified Way*

March 2019

## **Table of Contents**

Overview	Page 2
General RFP Information	Page 3
RFP Purpose	Page 3
The Foundation for Clovis Schools	Page 4
Why a Foundation	Page 5
Scope of Project	Page 6
Proposal Guidelines	Page 7
Fee Structure Guidelines	Page 7
Proposed Schedule	Page 8
Evaluation Process and Criteria	Page 8
Selection Process	Page 8

## **Overview**

The Foundation for Clovis Schools is seeking submissions from professional fundraising consultants to provide assessment of the potential for an endowment campaign and, based on the outcome of the initial support assessment, strategic planning services for such a fundraising campaign. There is additional potential to provide fundraising services during the actual endowment campaign based on successful completion of strategic planning.

Contact Person: Kelly Avants, APR, District Liaison to the Foundation  
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Date of Issue: Monday, March 4, 2019

Submission Deadline: Friday, April 12, 2019, 5:00 p.m. (PT)

Submit To: Kelly Avants, APR,  
Foundation for Clovis Schools  
1450 Herndon Ave.  
Clovis, CA 93611  
[kellyavants@cusd.com](mailto:kellyavants@cusd.com)

Board of Directors: Chair Hugh Awtrey; Vice-Chair Todd Cook; Past-Chair Mike Fennacy; Treasurer Adam Holt; Secretary Wes Qualls; Directors Doug Benik; Jimmy Dunn; Christine Lingenfelter; Jeff Markarian; Jared Martin; Dianne Nury; Eimear O'Farrell, Ed.D.; Brian Heryford; Pat Ricchiuti; Patrick Ruth

## **General RFP Information**

- The RFP and any addenda are available on the Foundation’s website at: [www.foundationforclovischools.com](http://www.foundationforclovischools.com).
- Any changes to the RFP or addenda will be posted no later than Monday, March 18, 2019, at 5:00 p.m. (PT). Organizations are responsible for checking the Foundation’s website to ensure that they have the most current RFP information.
- All questions pertaining to the RFP must be in writing and received no later than 5:00 p.m., Friday, March 22, 2019. Please send questions by email, using the subject line “Foundation Endowment Planning Services RFP,” to [karenrandall@cusd.com](mailto:karenrandall@cusd.com).
- The Foundation is not liable for any costs incurred by any organization or agent thereof in connection with this RFP. Expenses incurred by responding organizations and its agents are the sole responsibility of the organization and may not be billed or charged to the Foundation now or at any time in the future.
- Please submit five (5) printed copies of RFP responses to the Foundation address noted below, no later than 5:00 p.m. (PT), Friday, April 12, 2019. See instructions regarding submission of estimated costs and fees for service in the Required Information – Fee Structure section (Page 7).
- All submitted proposals are binding until ninety (90) calendar days following the submission due date of March 15, 2019.

## **RFP Purpose**

The Foundation for Clovis Schools, in on-going communication with the Superintendent and executive leadership, and observation of the organizational threats facing Clovis Unified School District, has identified a critical need for a perpetual funding source for leadership development specifically reflecting the long-standing and unique organizational culture of the District.

The Board of Directors has endorsed the creation of an endowed fund designated to:

1. Provide a steady funding source for leadership training in the Clovis Unified School District specific to the unique leadership tenets that defined the educational philosophies of Floyd “Doc” Buchanan, Ed.D., and which are articulated in “Building Leaders the Clovis Unified Way”
2. Provides a structure by which current and future leaders of Clovis Unified are held accountable to the community to devote effort to on-going development of young leaders in the unique values and philosophies that support the District’s success over time.

Toward this end, the Foundation seeks proposals from fundraising consultants interested in working with the Foundation to 1) assess the philanthropic community’s interest in supporting an endowment campaign for the above-referenced purpose; and 2) based on the community assessment develop a comprehensive strategic plan to guide the endowment campaign effort. The goal of this campaign is to increase existing funds available to establish an educational leadership endowment to the extent necessary to provide a perpetual revenue stream for an annual leadership development program.

The Foundation Board, and staff expect to collaborate actively with the selected firm in the work to ensure that the deliverables meet the Foundation's expectations and the needs of the District and community.

## **The Foundation for Clovis Schools**

**Our Vision:** *Investing in our schools today for a stronger community tomorrow.*

**Our Mission:** *To help students continually improve academic and personal achievement by providing funding for innovative classroom ideas and educational programs that stimulates and encourages students to aim high.*

The Foundation for Clovis Schools, a 501(c)(3) corporation, was founded in 1986 as a collaborative effort by community leaders to support local schools through fundraising and increasing the greater community's understanding and support of its public schools.

In 1986, Clovis Unified Superintendent, Dr. Floyd "Doc" Buchanan had the vision of a public schools foundation that would help ensure that our schools and kids always had the resources needed to excel. The foundation would fill the funding gaps when state and federal dollars weren't available. Thirty-three years later, the Foundation for Clovis Schools is still fulfilling its mission of providing opportunities for students to succeed academically and personally. The Foundation is directed by a volunteer Board of Directors (listed earlier), with staff liaisons to the Clovis Unified School District. To ensure the vision and work of the Foundation remains closely aligned to the needs of the District, both the President of the Governing Board for Clovis Unified as well as the Superintendent of the District serve as voting members of the Board of Directors.

In the 2017-18 fiscal year, the Foundation for Clovis Schools invested more than \$651,000 in students, teachers and classrooms throughout the district. More than 328 businesses, individuals and CUSD employees generously donated to the Foundation to support scholarships, program grants, new teachers and designated funds for students and schools.

Over time, the Foundation has invested well over \$6 million in Clovis Unified School District. Currently, three primary programs direct resources to students and educators to bridge funding gaps: new teacher grants, classroom and school mini-grants, and the Students of Promise Scholarship Program. Additionally, a number of designated scholarships and funds are managed by the Foundation on behalf of individual donors.

## **Why a Foundation?**

It's hard to believe when you see the results achieved by Clovis Unified but based on the per-student average daily attendance revenue figures, the district is the lowest funded school system in Fresno County. Receiving on average \$10,782.50 from most state and federal revenue sources, Clovis Unified receives \$2,369.43 less per student than the average received by other Fresno County unified school districts. If Clovis Unified received just the county average in per student funding it would have \$94.5 million more **per year** to support its students.

The Foundation for Clovis Schools exists to help bridge this funding gap, and support educators and students with resources needed to succeed. Grants and scholarships allow teachers to innovate and students to pursue their dreams when it would be otherwise impossible to do so. Because of the discrepancy in revenue between Clovis Unified and other local school districts, funds are stretched thinly to cover classroom needs and operational expenses. Over time the Foundation has positioned itself to provide resources that allow the District flexibility for innovation and to swiftly address emerging issues that occur in the midst of a budget cycle. Such was the case in recent fundraising by the Foundation to support emotional wellness initiatives in the school district following emerging social-emotional issues and student losses to suicide. This, too, is reason for interest in creating endowed funds to support leadership development, as budgetary pressures often target resources available for leadership training when state funding falls.

Currently, the Foundation's annual fundraising efforts are designated to support its primary programs of scholarships and mini grants, along with initiatives of the District. In addition, there exists a currently undesignated fund. These funds, raised over time to support the overarching mission and vision of the Foundation, have not yet been endowed to a specific purpose and would provide the initial resources toward creating *The Doc Buchanan Leadership Academy: Building Leaders the Clovis Unified Way*.

## **Scope of the Project**

The Foundation seeks proposals from fundraising consultants interested in working with the Foundation to 1) assess the philanthropic community's interest in supporting an endowment campaign for the above-referenced purpose; and 2) based on the community assessment develop a comprehensive strategic plan to guide the endowment campaign effort.

The goal of this campaign is to increase existing funds available to establish an educational leadership endowment to the extent necessary to provide a perpetual revenue stream for an annual leadership development program. Such a program would be supported through funds from the Foundation's endowment, with the content of the leadership training developed and delivered by Clovis Unified's Superintendent and his/her designees. Trainings funded by the endowment would align to the tenets articulated in Clovis Unified's "Building Leaders the Clovis Unified Way." At this time, the Foundation is not prepared to make public the estimated amount needed to establish an endowed fund that generates sufficient resources to support the District's educational leadership program. Any such resources would also require the Clovis Unified School District to support training efforts through the devotion of staff time and other resources needed to support and implement such a leadership training program.

We anticipate a two- or three-phase project:

### Phase I – Assessment of Philanthropic Community's Interest

- Conduct confidential interviews with Foundation's and District's leadership, and others
- Identify and evaluate resources available to support an endowment campaign
- Identify challenges to a successful campaign
- Identify potential prospects
- Complete an audit to assess internal capabilities to support a campaign
- Work with the Foundation to develop a case statement and story
- Conduct confidential interviews with potential prospects
- Determine realistic campaign goals
- Present findings to the Foundation's leadership and Board of Directors

### Phase II – Develop a Campaign Plan

- Develop a campaign plan, including specific goals for dollars raised, milestones, solicitation strategies, and a specific list of assigned tasks necessary to reach project goals
- Develop a campaign calendar
- Develop a campaign budget
- Evaluate campaign materials for potential effectiveness
- Present recommendations to the Foundation's leadership and Board of Directors

### Phase III (Possible based on outcomes of Phase I & II) – Endowment Campaign

- Conduct fundraising efforts based on execution of the previously developed campaign plan
- Assist Directors in meetings with targeted prospects, and deliver pitch

- Provide milestone updates and adjust solicitation strategies as needed to reach fundraising goals
- Present results to the Foundation's leadership and Board of Directors

## **Proposal Guidelines**

In order to identify the fundraising consultant best-suited to complete the previously outlined project, a consultant's proposal should contain:

1. Cover letter with firm's name, address, email, phone and website address.
2. Contact person's name, address, email and phone number.
3. Statement of philosophy.
4. A concise statement that demonstrates the organization's understanding of the project and scope of services sought.
5. Description of the organization's approach to the project, expected deliverables, and philosophy of fundraising; including respective roles of consultant versus Foundation Directors/liaison staff envisioned in project approach.
6. Description of the implementation of the project, including specific list of tasks and who will be responsible for completing the tasks. Include your planning and study process, how you will identify who to interview, and what information and recommendations will be included in the Phase I planning report.
7. Proposed completion date and timeline for project.
8. Description of any additional consultants that will perform work as part of the proposal. (Please provide names, titles, and relevant experience for each).
9. An overview of the consultant's professional fundraising and strategic planning experience and training, including the timeframe of the work and a summary of the scope of such experience and training. Include examples of previous work.
10. Type of organization, ownership (identify owners, partners, etc.).
11. Geographical areas of operation.
12. Professional affiliations.
13. List of principals and stakeholders.
14. Description of size and composition of the organization.
15. Resumes of proposed project manager and other key personnel proposed to be assigned to the project.
16. A summary of the type and size of clients with whom the consultant has successfully completed similar projects including professional references for clients with whom the organization has completed similar projects.
17. Any other information pertinent to the qualifications of the organization/consultant to successfully complete the project.

## **Fee Structure Guidelines**

18. Fee Structure: Provide information on your proposed fee structure which separately lists each service and related fee based on the scope of the project discussed above. Separately state, if necessary, any charges for anticipated reimbursable costs. This structure should be expressed as a

“fee not to exceed” figure which itemizes all services included in the proposed fee, as well as an itemized list of what would be considered “additional services” if requested by the Foundation.

The fee structure proposals should be separated for Phase I and II, and optional Phase III.

## **Proposed Schedule**

The Foundation anticipates this project to start in Summer 2019, with a consultant selected by May 30, 2019. Phase 1 and 2 are anticipated to be complete by the conclusion of the 2019-20 fiscal year, with Phase 3 commencing in the 2020-21 school year.

## **Evaluation Process and Criteria**

The RFP will be published and notice of its release sent to a select number of firms with relevant experience. The RFP and any addenda will also be available online at [www.foundationforclovischools.com](http://www.foundationforclovischools.com). The Foundation will select a consultant based on professional ability to meet the overall expectations of the Foundation. The Board of Directors will be the judge of which submission offers the greatest benefit and expertise for the project. The following criteria will be used in the selection process:

1. Responsiveness and completeness
2. Experience and qualifications of the consultant/firm, including demonstrated knowledge of planning, management, evaluation skills and experience.
3. Technical quality and methodology of consultant’s approach to organizing and managing the project; ability to document information and recommendations clearly in a written format.
4. Demonstration of understanding of project objectives and scope; responsiveness to the goals outlined in the RFP.
5. Experience with similar projects
6. References and examples of completed work
7. Overall project management and ability to accomplish a project of this nature within the proposed timeline

## **Selection Process**

The Foundation’s Board of Directors will evaluate written responses to the RFP. At their discretion, they may choose to invite the top-ranked organizations to participate in on-site interviews at their own expense. **Full details regarding** this interview process will be announced later in the RFP evaluation process.

The Foundation’s Board of Directors will evaluate, select organizations for interviews, check references, make the final decision, and enter in contract negotiations with the successful organization. If these negotiations fail, the Foundation will proceed with contract negotiations with the firm scoring second, and so on at their discretion. Unsuccessful respondents will be notified as soon as possible.

The Foundation is under no obligation to make a selection under this RFP and reserves the right to make any selection it chooses. The Foundation reserves the right to reject any and all submissions at its sole discretion, accept a proposal based on considerations other than cost, and waive or modify any provision of this RFP.