REQUEST FOR PROPOSAL
FUNDRAISING CONSULTING FIRM/CONSULTANT

Strategic Fundraising Development Plan (5 year)
Sealed proposals addressed to the "Chief Resource Officer" Arizona Foundation for Legal Services & Education (hereafter referred to as AZ Bar Foundation), 4201 N 24th Street, Suite 210, Phoenix, Arizona 85016 will be received until 5:00 p.m., 2012, Friday, March 30th, for supplying all of the following, subject to the conditions herein. Proposals received late shall not be accepted.

Bidders **must** deliver a signed copy of the proposal to the above address in a sealed envelope.

The AZ Bar Foundation is an AA/EOE employer, minority and disadvantaged businesses are encouraged to submit proposals.

SECTION 1.0 PURPOSE
1.1 The AZ Bar Foundation is requesting submissions from fundraising consultants interested in undertaking a Five Year Strategic Fundraising Development Plan on its behalf. The AZ Bar Foundation seeks to retain a Fundraising Consulting Firm/Consultant to:

- Ascertain increased support, by reviewing existing initiatives and exploring new possibilities, from the legal community, without competing with current partner initiatives;
- Ascertain potential support, by reviewing existing initiatives and exploring new possibilities, from the general public outside of legal community;
- Develop effective campaign strategies;
- Develop a planned giving initiative as part of the campaign strategies; and,
- Recommend a potential course of action, including working to identify resources needed and roles established to meet the fundraising objectives identified in the plan developed.

1.2 The purpose of this Request for Proposal is to retain a Fundraising Consulting Firm/Consultant who will:

1.2.1 Develop and conduct a detailed feasibility study which will analyze and report on the feasibility of AZ Bar Foundation fundraising required to complete (a) A renewed interest in the Fellow's program to expand membership of the legal community allowing for an ongoing process to recruit and renew members, (b) garnered support from the general public both with increased awareness, participation, and financial contributions, and (c) planned giving program to introduce and implement for current/future donors

1.2.2 Complete internal and external audits, through direct interviews with potential donors and other sources to be identified by the AZ Bar Foundation and the consultant, which detail and realistically assess the AZ Bar Foundation's fundraising capability for identified projects without hindering/detracting from other similar fundraising initiatives by partnering entities.

1.2.3 Develop with the assistance of the AZ Bar Foundation staff and board a Case Statement and other fundraising resources to be used in implementing the plan's initiatives including working with the AZ Bar Foundation administration, staff, board and volunteers to prepare for the fundraising initiatives developed in the plan.

SECTION 2.0 QUESTIONS

2.1 All questions pertaining to this proposal **must** be made in writing and sent to:
Lara Slifko, Chief Resource Officer, no later than Friday, Feb. 24, 2012: lara.slifko@azflse.org or fax – 602-773-3105. After this date, no further inquiries, concerns, or questions may be submitted. We reserve the right to distribute in writing a notice of content of any inquiry and any response. The AZ Bar Foundation will respond only to questions submitted in writing. Questions will be answered by Wednesday, Feb. 29, 2012.

SECTION 3.0 MINIMUM REQUIREMENTS

3.1 Appendix A identifies the minimum requirements. Failure to respond to Appendix A will deem the bid noncompliant. If entering terms and conditions in electronic format, a copy **must** be printed and signed.
3.2 Bidders **must** submit Appendix B.
3.3 Bidders' submissions **should** include page numbers for ease of reference by Committee Members. Alternative and additional information can be indexed at the end of the proposal.

SECTION 4.0 SCOPE OF WORK AND QUESTIONS

4.1 Appendix B details specific requirements/specifications/scope of work and questions which all bidders **must** complete. For each question in Appendix B bidders **must** offer a response.

SECTION 5.0 PRICING

5.1 All bids **must** be entered in Appendix B.
5.2 Proposals **must** clearly outline the responsibilities both of the AZ Bar Foundation and the successful bidder. **ALL** costs payable by the AZ Bar Foundation for these services **must** be clearly defined.
5.3 Applicable taxes must be shown as a separate line item on all invoices.
5.4 All prices quoted will be in effect for the duration of the contract ending without escalator clauses or other qualifications.

SECTION 6.0 - REFERENCES

6.1 Each proposal **must** provide a minimum of (3) references where the bidder has successfully performed similar services. Each reference **must** contain the following information: 1. Agency Name, 2. Address, 3. Contact Person & Telephone. References **should not** include Directors of The AZ Bar Foundation or State Bar of Arizona

SECTION 7.0 TERM OF CONTRACT/IMPLEMENTATION SCHEDULE

7.1 This contract will be up to a three-month period with a target commencement date of May 1st, 2012. We are looking to have the study completed no later than Sept. 3rd, 2012.

Bidders must provide an implementation schedule of the proposed study.

SECTION 8.0 INTERVIEW

8.1 Each bidder may be required to attend an interview to further clarify its proposal. No new information would be presented at this stage.

SECTION 9.0 ADMINISTRATION, ORGANIZATION AND STAFFING

Include:

9.1 An organization chart if appropriate.

9.2 State the correct legal name under which the bidder carries on business, telephone number and fax number, as well as the name or names of appropriate contact personnel which the AZ Bar Foundation may consult regarding the proposal.

9.3 Indicate if a bidder is a sole proprietor, the full personal name together with the name of the proprietorship, (i.e., John Doe, DBA the firm name of "John's Excellence Service").

9.4 If a bidder is a partnership, the bidder **should** provide the full name of all individual partners together with the correct legal business name of the partnership.

9.5 If a bidder is a corporation, the bidder **should** provide the full legal name of the corporation together with the jurisdiction in which the corporation was originally incorporated.

9.6 The successful bidder(s) and their employees shall not be considered AZ Bar Foundation employees and shall not represent themselves as an agent of the AZ Bar Foundation.

SECTION 10.0 SUPPLEMENTAL MATERIALS TO YOUR PROPOSAL

10.1 Supplemental materials **will not qualify** as substitutes for direct responses to the proposal's requirements. Required responses **must** be stated or input into **Appendices A and B**.

10.2 The proposal may make reference to supplemental materials if submitted. However, the response **must** be stated in such a way within the proposal that it is not necessary to refer to the supplemental material to evaluate the response (except specifically requested material, such as the bidder's financial statements etc.).

10.3 The technical and cost sections of the proposal may not make reference to supplemental materials.

10.4 Note that any such supplemental materials submitted will not have an effect on the independent evaluation process.

SECTION 11.0 GENERAL TERMS AND CONDITIONS

11.1 Any proposal submitted in response to this Request for Proposal is **IRREVOCABLE** for 60 days. The AZ Bar Foundation reserves the right to decline any or all proposals, in whole or in part, at any time prior to making an award, for any reason or no reason, without liability being incurred by the AZ Bar Foundation to any bidder.

11.2 All costs associated with the preparation of the bidder's proposal will be solely the responsibility of the bidder.

11.3 All of the terms and conditions of this Request for Proposal are assumed to be accepted by the bidder and incorporated into its proposal.

11.4 All bidders agree not to disclose any information provided by the AZ Bar Foundation in this Request for Proposal to any third party.

11.5 Any proposal submitted which does not strictly comply with the provisions, procedures

and requirements of this Request for Proposal, or is incomplete, ambiguous, or which contains errors, alterations, misleading information, omissions, or irregularities of any kind, may be rejected and disqualified at the discretion of the AZ Bar Foundation.
11.6 All bidders agree to provide additional information as, and when, requested, at their own expense, provided no bidder in supplying any such information will be allowed, in any way to change the pricing or other cost quotations originally submitted in its proposal or in any way materially alter or add to the solution originally proposed.
11.7 Bidders are required to identify any material facts regarding any claims that the AZ Bar Foundation should be made aware of.
11.8 The AZ Bar Foundation is an AA/EOE employer, minority and disadvantaged businesses are encouraged to submit proposals.

SECTION 12.0 IMPORTANT DATES
12.1 Friday, Feb 17th, 2012 Issue Request for Proposal
12.2 Friday, March 30th, 2012 Closing date for Request For Proposal. – 5:00 p.m.
12.3 Tuesday, May 1, 2012 Development Planning Commences
12.4 Monday, Sept. 3, 2012 Development Planning Completed

I hereby acknowledge that I have read, understand and agree to the forgoing Contract Terms and Conditions.

Name:
_____Signature:_____
(Please print)

Firm Name: _____Email:_____

Internet Address (if applicable): _____

Address: _____

City, State, Zip:_____

Telephone No.:_____

Fax No.: _____

This page must be signed below and returned with your proposal for your bid to be accepted.

APPENDIX A

Minimum Requirements

Experience – A minimum of 5 years fundraising experience/consulting including: direct appeal, planned giving, events, and mass marketing

Demonstrable track record - Has assisted in successful fundraising/development planning for at least 3 organizations:

1. Agency Name, Address, Contact person & telephone:

2. Agency Name, Address, Contact person & telephone:

3. Agency Name, Address, Contact person & telephone:

Location – Ability to travel to Arizona to meet with AZ Bar Foundation and others as identified in the proposal

Contract capability - Deliver the completed 5 Year Strategic Fundraising Development Plan by September 3, 2012 in Microsoft office compatible document(s)

I hereby acknowledge that I have read, understand and certify that I meet the minimum requirements as stated.

Name: _____Signature: _____
(Please print)

Firm Name: _____

This page must be signed below and returned with your proposal for your bid to be accepted.

APPENDIX B

Scope of Work, Questions, and Pricing

Scope of Work

1) Please outline the key factors you will use in assessing the feasibility of AZ Bar Foundation fundraising to complete each of the following components:

- A renewed interest in the Fellow's program to expand membership of the legal community allowing for an ongoing process to recruit and renew members;
- Garnered support from the general public both with increased awareness, participation, and financial contributions; and,
- A Planned giving program to introduce and implement for current/future donors

2) Please outline/explain the process you will take to assure that the fundraising initiatives of the AZ Bar Foundation partners: State Bar of Arizona, Equal Justice Campaign, and the Arizona Legal Aid grantees will not be negatively impacted by fundraising initiatives outlined in the 5 Year Strategic Fundraising Development Plan proposed *(upon award of the contract, appropriate contact information will be provided by AZ Bar Foundation Staff*) –

3) Please outline/explain the information you will include in the completion of the Case Statement portion of the 5 Year Strategic Fundraising Development Plan

Questions

1) What knowledge/awareness do you have of any/all of the following: (a) AZ Bar Foundation, (b) State Bar of Arizona, (c) legal aid needs/services, (d) legal profession/community, (e) law related education, and (f) the education profession/community
2) What information, participation, and/or expectations will you require of the AZ Bar Foundation staff and board to successfully complete the 5 Year Strategic Fundraising Development Plan within the specified time frame?
3) What prior fundraising work have you successfully completed with the following: (a) Foundations that grant money and are not solely a service organization, (b) raising dollars from individuals, increasing donations and creating new donors, (c) event planning for fund raising, and (d) planned giving initiatives?

Pricing

The bid proposal must include costs of services and projected expenses, including any travel anticipated. The bid proposal does not include the costs of development for the promotional materials, which may be included as a recommendation of the 5 Year Strategic Plan. If the bid pricing is presented upon an hourly basis, a minimum and maximum total cost must be included in the bid proposal.