



Request for Proposal
NAHMA Educational Foundation Strategic Fundraising and Marketing Program

RFP Overview

The National Affordable Housing Management Association (NAHMA) Educational Foundation intends to launch a strategic fundraising and marketing program designed to increase donations to and awareness of its national scholarship program, which provides scholarships to residents living in affordable housing properties managed by NAHMA and its affiliated Affordable Housing Management Association (AHMA) member companies. Residents seeking scholarships are individuals entering or continuing post secondary training at a college, university, community college, or trade/technical school.

The purpose of this Request for Proposal (RFP) is to obtain proposals to develop and implement a strategic fundraising and marketing program for the NAHMA Educational Foundation with the twin goals of increasing donations to and awareness of the NAHMA Educational Foundation national scholarship program to two distinct audiences:

- 1) Internal, i.e., NAHMA and AHMA member companies, and
- 2) External, i.e., grantmaking institutions and other potential donors.

About the NAHMA Educational Foundation

The NAHMA Educational Foundation is organized and operated exclusively as a charitable organization within the definition of Section 501(c)(3) of the Internal Revenue Code of 1986. Since 1994, the Foundation has nurtured the dreams of residents living in affordable housing. In accordance with its charter the Foundation has directed its efforts in the following ways:

- Engaged in activities and provided grants and contributions to help relieve the burdens faced by disadvantaged families;
- Raised funds and distributed scholarships to children eager to attend a college, university or trade school; and
- Promoted programs which demonstrate the value-added aspects of affordable housing to the larger community.

In particular, through its fundraising efforts in the past seven years, the NAHMA Educational Foundation's national scholarship program has awarded scholarships worth \$350,000 to more than 270 residents. These totals are particularly impressive considering that in its inaugural year of 2007, \$22,000 was awarded to 22 NAHMA Scholars. In 2013, 59 worthy student residents received a total of \$137,500. For more information visit our web site at http://www.nahma.org/content/ed_found.html.

Scope of Work

The purpose of this RFP is to identify and contract with a qualified individual, group, or company to develop and implement a strategic fundraising and marketing program for the NAHMA Educational Foundation with the twin goals of increasing donations to and awareness of the NAHMA Educational Foundation national scholarship program to both internal and external audiences.

The selected contractor will work with the NAHMA Educational Foundation Board of Directors (or a task force thereof) and NAHMA staff throughout the development and implementation of the strategic fundraising and marketing program.

The proposal should offer an outline of major steps and “not-to-exceed” costs per steps that provide a roadmap and budget for the strategic fundraising and marketing program.

The contractor will be required to meet certain deadlines established by the NAHMA Educational Foundation, such as:

- ❑ Dialogue with NAHMA Educational Foundation Board of Directors (or a task force thereof) and NAHMA staff to gain clear understanding of the organization, its mission, and the national scholarship program to facilitate development of the strategic fundraising and marketing program. Timeframe – within 45 days of proposal acceptance.
- ❑ Based on this dialogue, present a more detailed proposed list of specific activities to be conducted and/or materials to be developed within each of the major steps outlined in the proposal submitted. (The activities/materials should fit within the proposed “not-to-exceed” costs outlined in the proposal submitted.) It is expected that the specific activities will include identification of potential grantmaking organizations, and the development and submission of grant applications/requests by the contractor to these organizations on behalf of the NAHMA Educational Foundation. Timeframe for development of detailed proposed list of specific activities – within 75 days of proposal acceptance.
- ❑ After review and approval by the NAHMA Educational Foundation Board of Directors, launch development and implementation of the strategic fundraising and marketing program. Timeframe – within 90 to 100 days of proposal acceptance.

NAHMA Educational Foundation’s Support

The NAHMA Educational Foundation will support the contractor as follows:

- ❑ Coordinate communications with and between the NAHMA Educational Foundation Board of Directors, NAHMA and AHMA members (as needed) and NAHMA staff;
- ❑ Provide a designated NAHMA Educational Foundation representative to serve as liaison to the contractor for the purposes of consultation, counsel, and the mutual exchange of relevant information;

- Meet all terms of the mutually developed and executed contract for work based on the accepted proposal.

RFP Procedures

RFP responses should address the questions on page 5 of this proposal, and in particular, focus on the following criteria:

- Contractor’s credentials in developing a strategic fundraising and marketing program for a non-profit public charity
- Contractor’s experience with all matters related to the creation, operation, and maintenance of a strategic fundraising and marketing program, including grantwriting; provide details of past projects’ results
- Ability to meet specific deadlines as outlined in the RFP, which will be a term of the contract to be executed between the NAHMA Educational Foundation and the contractor
- A proposed total “not-to-exceed” cost for development and implementation of the strategic fundraising and marketing program; projected ongoing costs for work past the initial development and implementation, such as ongoing grantwriting services, should be provided as an estimated hours per month/cost basis
- References

Questions regarding this RFP should be emailed to NAHMA Director of membership services Brenda Moser at Brenda.Moser@nahma.org.

Date	Activity
Feb. 7, 2014	NAHMA Educational Foundation issues RFP
Mar. 7, 2014	RFP responses due
Mar. 9, 2014	NAHMA Educational Foundation Board meets in person and reviews RFP
Mar. 24-Apr 4, 2014	Review/follow up with contractors on proposals (if needed)
Apr.7, 2014	Final selection of contractor
By Apr. 21, 2014	Execution of a contract with the NAHMA Educational Foundation
By May 21, 2014	Dialogue with NAHMA Educational Foundation Board of Directors
By June 13, 2014	Presentation by contractor of a more detailed proposed list of specific activities to be conducted and/or materials to be developed within each of the major steps outlined in the proposal submitted

- June 18, 2014 NAHMA Educational Foundation Board meets in person and reviews detailed proposed list of specific activities to be conducted and/or materials to be developed
- June 23-27, 2014 NAHMA Educational Foundation Board provides feedback to contractor on proposed list of specific activities/materials
- July 2014 Contractor revises plan as needed and moves forward with implementation

Evaluation Process

Proposals will be evaluated by the NAHMA Educational Foundation Board of Directors. Selection consideration includes the following criteria:

- a) Actual experience in development and implementation of successful strategic fundraising and marketing program, including successful grantwriting, while working within agreed upon schedule and costs.
- b) Proposed costs.
- c) References.
- d) Sample of materials from previous work in similar programs.

Please submit proposals in MS Word format via email to Brenda Moser at Brenda.Moser@nahma.org.

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Please provide answers to the following questions:

GENERAL COMPANY INFORMATION

- 1) Provide a brief history of your company, including the number of years your firm has been in business and an overview of the number and types of strategic fundraising and marketing programs your company has helped to create from conception to implementation, including a discussion of major aspects of the programs and how they were successful.
- 2) Describe your company's mission.
- 3) Provide a brief summary of your company's operations.
- 4) How many employees work for your company and how many would be dedicated to this project?
- 5) Provide a partial list of your company's customers and the type of services that you provide them.

EXPERIENCE

- 6) Describe your company's experience with strategic fundraising and marketing programs/projects.
- 7) What distinguishes your company and your products from your competition?

PROJECT-SPECIFIC INFORMATION

- 8) Provide an outline of major steps and "not-to-exceed" costs per steps that provide a roadmap and budget for the strategic fundraising and marketing program.
- 9) Describe your process for responding to information requests and updates from the NAHMA Educational Foundation.
- 10) Present as a total proposed "not to exceed" cost for providing all required deliverables in the timeframe outlined in this RFP, as well as an itemized breakdown of fees or projected fees for ongoing implementation/grantwriting services.

REFERENCES and OTHER INFORMATION

- 11) Please list the organization name, contact person and telephone number of three (3) references for similar projects, as well as a brief description of each project.
- 12) Provide any other information that you believe is pertinent to this Request for Proposal.