

## Association of Fundraising Professionals | Request for Proposals Donor Advised Fund Content Expert | November 2024



Since 1960, AFP has inspired global change and supported efforts that have generated over \$1 trillion in philanthropic support to the charitable sector. AFP's nearly 26,000 individual and organizational members, represented by more than 240 chapters worldwide, raise over \$115 billion annually, equivalent to one quarter of all charitable giving in North America and millions more around the globe. As the preeminent association for professional fundraisers, AFP advances philanthropy through research, advocacy, education and certification programs, and more.

If you intend to respond to the RFP, please note the following target deadlines:

- RFP Release: November 7, 2024
- Proposals Due by: January 6, 2025

All inquiries and correspondences should be directed to Kimberly Boyd Lewis at [kimberly.boyd-lewis@afpglobal.org](mailto:kimberly.boyd-lewis@afpglobal.org)

## Background

AFP and the AFP Foundations for Philanthropy continuously work to support philanthropy and the nonprofit sector. AFP is committed to providing relevant information about philanthropy, donors, and industry trends to professionals working to secure the resources nonprofits need to deliver on their missions.

Nonprofit organizations are vital to our world, filling societal gaps for the most vulnerable populations. As our country and the world grapples with growing disparities in wealth, education, and even essential services, critical mental health challenges, and political unrest, nonprofits will be called on to do even more. Yet, at precisely the moment when reliance on nonprofits will increase, they have entered a period of stress that threatens their vitality and effectiveness.

As an innovator in the nonprofit sector, AFP is committed to helping address the challenges faced by our members.

In January 2024, The AFP (Association of Fundraising Professionals) Foundation for Philanthropy received a significant investment from the Fidelity Charitable® Catalyst Fund. This three-year collaboration is designed to support the development of new educational opportunities and considerable research on emerging trends impacting the fundraising profession and nonprofit sector, specifically donor-advised funds (DAFs).

(DAFs), are becoming a growing and integral part of philanthropy in the United States, with the number of individuals setting up DAFs and the value of funds continuing to increase. However, education on those trends and topics is not readily available despite this growth. Many professional fundraisers are unclear about how they work and how they could benefit their nonprofit organizations. Professional fundraisers need to understand better how to access and steward the donors who set up these funds.

To address this issue, the AFP Foundation for Philanthropy will use the funds from this grant to work with DAF and curriculum experts to create various training opportunities for fundraising professionals. These deep dives, webinars, in-person events, and e-courses will focus on incorporating access to DAF dollars into fundraising strategies. Nonprofits based in the South Central and Mountain West regions of the United States (AL, AR, AZ, CO, ID, KY, LA, MS, MT, NV, NM, OK, TN, TX, UT, WY) will receive particular attention, as these are regions of the country that often get the least access to philanthropic dollars and professional development.

## Scope of Work

AFP is seeking a content expert to support the development of a curriculum on Donor Advised Funds (DAFS).

The following is the preferred high-level scope of work for the content expert for the Donor Advised Fund Program described in this RFP:

- Through this RFP, AFP is seeking a qualified vendor/contractor to enhance understanding and awareness of DAFs as the curriculum on Donor Advised Funds (DAFs) is developed.
- Offer guidance on developing and designing the comprehensive curriculum for Donor Advised Funds, which will later be taught through various delivery options.
- Conducts research on trends, regulatory changes, and best practices related to DAFs.
- The curriculum will be piloted in the second quarter of 2025.
- The selected vendor/consultant must have at least eight to ten years of experience and proven expertise in donor-advised funds (DAFs).
- The selected vendor/consultant will participate in pre-delivery curriculum refinement with AFP lead staff, in at least two debriefing assessments post-training, and at least one round of curriculum refinement.
- Contract Start Date: Winter 2025

## Response Requirements and Criteria

### Format of Proposals

Proposals should be formatted in the following structure:

- 1. Executive Summary**
  - a. Contact information for both the vendor and contact person
  - b. High-level vision for this project and what would be accomplished
  
- 2. Technical Proposal**
  - a. Explain the firm's process and methodology concerning curriculum design and instruction delivery strategies.
  - b. Clearly outline your expectations of what AFP needs to achieve the results you recommend.
  
- 3. Project Team and Process**
  - a. Minimum of three references from past clients
  - b. Listing of key personnel who will be participating in this project
  - c. Communication process, including lines of reporting
  
- 4. Company's Commitment to Inclusion, Diversity, Equity, and Access (IDEA)**
  - a. Please include if your company is owned by women, a person/people of color, or other identifiers of diversity
  - b. Please detail how your firm is committed to inclusion, diversity, equity, and access
  
- 5. Financial Proposal**
  - a. Detail and itemize costs for the project including sourcing and creation of all content, the phasing of the project, etc.
  - b. Please price each item separately and provide a price point for moving forward with all options noted above.
  - c. Include all other ancillary costs.
  - d. Any costs not detailed/itemized will not be considered in the event your proposal is selected

### Evaluation Criteria

The AFP will consider the following criteria:

**Overall Qualifications:**

- Potential ability of the firm/vendor to deliver all RFP services within the timeline identified
- Approach to project management
- Commitment to IDEA principles
- Client references

**Financial Proposal:**

- Competitive Pricing
- Clear explanation of all costs

**Confidentiality**

AFP shall keep confidential all Confidential Information submitted by the Disclosing Party in response to this RFP and shall ensure at least the same degree of care in safeguarding Confidential Information as it uses for its information of like importance, but in no event less than a reasonable standard of care.

Notwithstanding the foregoing, AFP reserves the right to disclose where necessary the Confidential Information to those of its Representatives who require such information for the purposes of the project, provided that such Representatives are made aware of and required to comply with the obligations of confidentiality contained in this agreement. AFP shall comply with other reasonable security measures regarding the Confidential Information requested in writing by the Disclosing Party.

**Equal Opportunity Statement**

Although commitment to IDEA principles is a consideration, decisions regarding the retention of vendors or independent contractors will not be made on the basis of race, color, religion, creed, age, gender or sex (including pregnancy), national origin or ancestry, disability, veteran’s status, genetic information, gender identity, sexual orientation, marital status or any other legally protected characteristic of the owners, employees of the vendor, or members of the vendor’s team assigned to AFP.”

**Property**

All Work Product, and other results, systems and information developed by vendor and/or AFP in connection with such consulting services and shall remain the sole and exclusive property of AFP.

### **Accessibility**

As part of the curriculum design process, we require that all proposed curriculum materials adhere to established accessibility standards to ensure that all learners can fully engage with the content, regardless of ability.