

**Association of Fundraising Professionals | Request for
Proposals Fundamentals of Fundraising Curriculum Refresh |
December 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: December 9, 2024
- Proposals Due by: January 20, 2025

All inquiries and correspondences should be directed to Kimberly Boyd Lewis at kimberly.boyd-lewis@afpglobal.org

Background

The *AFP Fundamentals of Fundraising course* is an introductory, 2-day course providing a comprehensive overview of fundraising principles at the fundamental level. The course content covers the roles and responsibilities of fundraisers, emphasizing responsibilities you are likely to encounter at the beginning of your career.

The course is taught actively and includes case studies and projects for groups and individuals, making the learning experience substantive and enjoyable.

The learning objectives for the course include the following:

- Discuss the essential components of an integrated development plan.
- Explain the elements of a marketing and communications plan that shares the organization's message, informs constituents, and engages donors.
- Develop and sustain relationships with prospective donors, current donors, and volunteers.
- Plan individual and group solicitation strategies to secure annual and major gifts.
- Execute management policies and procedures to ensure fundraising activities are conducted with proper records management and stewardship.
- Demonstrate key ethics and accountability principles and practices in fundraising activities.

The *AFP Fundamentals of Fundraising course* is available as both a classroom learning program and an e-course.

Scope of Work

AFP seeks a vendor to refresh the Fundamentals of Fundraising curriculum, which was last updated in 2017.

The following is the preferred high-level scope for the Fundamentals of Fundraising curriculum redesign described in this RFP:

- Through this RFP, AFP is seeking a qualified vendor to refresh the comprehensive curriculum for Fundamentals of Fundraising, which is taught through a 2-day course. The updated curriculum should include AFP's principles of IDEA and Ethics as well the differences in fundraising in the United States and Canada.
- The selected vendor must have at least ten years of experience and proven expertise in designing and delivering training courses to nonprofit and/or membership organization professionals.
- The selected vendor will participate in pre-delivery curriculum refinement with AFP lead staff, at least two debriefing assessments post-training, and at least one round of curriculum refinement.
- The selected vendor will update the curriculum as needed to incorporate the latest learning and best practices. Such best practices should include but not be limited to the inclusion of new or enhanced fundraising modalities such as Donor Advised Funds, AI, and Digital Fundraising to name a few.
- Contract Start Date: Winter 2025
- The curriculum will be delivered in third quarter of 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**

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- a. Explain the firm's process and methodology concerning curriculum design and instruction delivery strategies.
- b. Clearly outline your expectations of what is needed from AFP to achieve the results you are recommending.

3. Project Team and Process

- a. Minimum of three references from past clients
- b. Listing of key personnel who will be participating on 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

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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 own 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.