



JUNIOR LEAGUE OF  
**WASHINGTON**

## **Request for Proposal: Fund Development Consultant**

**Organizational Overview:** The Junior League of Washington (JLW) is a Washington-DC based nonprofit membership organization with more than 2,300 highly trained volunteers and a \$1.2M annual budget. We have been serving the Washington, DC area for 106 years and are committed to developing exceptionally qualified civic leaders who are prepared to address the ever-evolving needs of our community through volunteer service, meaningful programs and initiatives, and innovative solutions. Please refer to [jlw.org](http://jlw.org) for more insight about the League's mission and focus area.

**Fund Development Overview:** JLW has long been focused on large-scale, [event-based fundraisers](#) that both raise money for the League and provide valuable training for our members. While these events are a primary source of contributed income, JLW also generates income through an investment portfolio and endowment (known as the Impact Fund); two rental units on the top floor of our DC headquarters in Georgetown; membership dues; partnership/give back opportunities; traditional annual giving; corporate sponsorships; and a recently established legacy giving program.

In 2014, an internal task force explored how JLW could diversify the sources of the money it raises annually, improve member and donor satisfaction, build a positive and mission-centered image of JLW, and provide adequate training and leadership development for members. Over the past five years, the League has subsequently gained insights from these recommendations, analyzed the year-over-year financial performance of our fundraisers, evaluated the number of members serving on fundraising-related placements, studied annual member survey results, hosted focus groups, and sought additional understanding of how we allocate human and financial resources and how those choices affect members.

Viewed through the lens of the task force findings and subsequent work, JLW will sunset its longest-running fundraiser, Holiday Shops, at the end of 2019 due to declining revenue and major changes to the retail landscape; presently, the event nets roughly \$130,000 annually. In preparation for this loss of revenue, the Board of Directors seek to further its execution of fundraisers, as well as identify additional opportunities for generating income.

**Scope of Work:** JLW intends to retain the services of a professional fund development consultant to guide the organization in development of a strategy that 1) decreases dependence on an event-based model and 2) identifies new revenue streams for contributed income. Such a plan should build from the aforementioned work done by JLW's volunteers<sup>1</sup>, as well as our evolving staff model<sup>2</sup>, in order to provide interim and final deliverables<sup>3</sup> to the Board of Directors.

- **Interim Deliverable 1:** *Current State Analysis:* identification of pain points of League's current fundraising process and strategic hypotheses for potential changes.
- **Interim Deliverable 2:** *Opportunities for Improvement:* near- and long-term opportunities to consider, including level of effort, and other assessment factors in order to better understand the implementation scale and ROI.

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<sup>1</sup> 2014 Fund Development Task Force recommendations and subsequent diligence will serve as reference material for the awardee.

<sup>2</sup> JLW is currently in its first year of a three-year staff model transition.

<sup>3</sup> We are open to considering alternative deliverable break-outs upon further consultation with candidates and/or the awardee.



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- **Final Deliverable:** *Fund Development Strategy and Implementation Roadmap:* Cohesive 2-3 year strategy that builds on Interim Deliverable 1 and 2 to provide strategic alternatives for JLW to consider. This should include key factors and recommendations for implementing the strategy, as well as a high-level roadmap to implement the strategy (e.g., creating a Case for Support).

In order to provide said deliverables, it is critical that the awarded consultant commits to understanding JLW's organizational structure, culture, mission, and values. As such, we expect that the consultant should plan to meet in person with the Board of Directors at least twice: once at the launch of the project and again to provide final deliverables. In order to support progress and the development of interim deliverables, we expect the consultant to participate in an onboarding meeting with an oversight advisory committee and other relevant parties, as well as participate in twice-monthly check-ins either via call or in person.

**Timeline:** The League's next fiscal year begins June 1, 2019. Our goal is for the project to run roughly the first half of the fiscal year:

- Engagement launch by July 4
- Kickoff meeting with Board of Directors (tentatively August 12)
- Interim deliverable #1 (tentatively by October 10)
- Interim deliverable #2 (by November 12)
- Final deliverable presentation to the Board of Directors (tentatively December 3)
- Project conclusion by December 31, 2019

**RFP Requirements:**

- Firm name and relevant history; description of firm capabilities;
- Biography of assigned project lead;
- Ability to complete the scope of work in the proposed time frame;
- Examples of completed projects of similar scope;
- Proposed monthly cost for completion of the requested scope. All hourly cost models should include reasonable estimates of time needed for completion.

**Evaluation Criteria:** Bids will be evaluated on the following criteria:

- Demonstrated innovation, creativity and initiative;
- Sufficient experience serving organizations similar in size, mission, or business model;
- Process for delivering services appropriate to JLW's needs;
- Ability to complete the project in the above timeline;
- Bid price.

Proposals should be submitted to [president-elect@jlw.org](mailto:president-elect@jlw.org) no later than May 17 at 5 p.m.