

Overview

Ursuline Academy of St. Louis (UA) is seeking submissions from fundraising consultants to provide professional services for a campaign assessment and potential campaign.

Contact Person: Peggy Slater, President
pslater@ursulinesl.org
(314)984-2801

Date of Issue: July 20, 2021

Due Date: August 10, 2021

Submit to: Peggy Slater, President
pslater@ursulinesl.org

Board of Trustees: Kelly Dulle, Sheila Effan, Rick Effer, Lisa Frederick, Chris Frein, Jeff Grieshaber, Kelly Imo, Tony Kennedy, Tom Kraus, Merry Kweiter, Chris Lawhorn, Tim Leon, Sr. Chabanel Mathison, Karen Mortillaro, Tom Murphy, Deb Tallo.

General

1. The RFP is available on Ursuline's website at:
<https://www.ursulinesl.org/employment-opportunities/>
2. All questions pertaining to the RFP must be in writing and received no later than 5:00p.m. CST, August 5, 2021. Submit questions via submission form at
<https://www.ursulinesl.org/employment-opportunities/>
3. Please submit(1) paper copy and (1) electronic copy to the Ursuline mailing address and email address noted in the Submissions section, no later than 5:00 p.m. CST, August 10, 2021.
4. All submitted proposals are binding until December 31, 2021.

RFP Purpose

Ursuline Academy seeks proposals from fundraising consultants interested in working with the Academy to (i) assess the philanthropic community's interest in supporting a campaign; and (ii) develop a campaign based on such assessment. The goal of the campaign is to align with the 175th celebration of the Academy and to address the need of expanding resources in the areas of academic excellence, scholarships and other Academy priorities. The Ursuline Academy Board, President and staff expect to collaborate actively with the selected firm in the work to ensure that the deliverables meet Ursuline's expectations and the needs of the Academy.

Ursuline Academy

Founded in 1848, Ursuline Academy is a Catholic college prep high school for young women, with an enrollment for 21-22 of 335 students. We are part of an international network of Ursuline Schools. As a nationally-recognized school of excellence, we provide a program for a range of college-bound learners so they may achieve their potential with faith-life, academics, arts, athletics, leadership and community service. Our warm and welcoming environment encourages respect for the individual, high academic standards, global awareness and service to our worldwide community. The result of an Ursuline education is a confident young woman prepared for living and leading in a diverse world. Ursuline Academy, is located on 28 acres in Kirkwood, MO, a suburb of St. Louis, MO.

The Board of Trustees is considering a campaign to coincide with the 175th anniversary of the establishment of the Academy. The goal of the campaign is to align with priorities of the strategic plan, currently being drafted. Priorities likely to include expanding financial resources in the areas of scholarship, faculty support, technology and small capital improvements (under \$50,000). An additional goal of the campaign is to stimulate and increase planned giving commitments.

The annual operating budget for FY20 was \$6.1 million including \$5.6 million in endowment investments, reserve funds. The fiscal year runs from July 1 – June 30. In FY20, the operating budget came from the following sources:

Tuition 87%,
Fundraising Revenue 12%
Investment Income (4%)
Interest/dividend/other Income 5%

Project Scope

We are seeking a consultant to help us prepare for a capital campaign and explore what financial goals might be feasible within a capital campaign.

The goal of the campaign is to maximize the opportunity presented by a historic milestone for the Academy with the 175th celebration and to address the need of expanding resources in the areas of scholarship, faculty support, technology and other Academy priorities.

We anticipate a three or four phase project:

Phase 1 – Assessment of the philanthropic community's interest

- Conduct confidential interviews with Ursuline leadership, directors and others
- Identify and evaluate resources available to support a campaign
- Identify challenges to a successful campaign
- Identify potential prospects
- Complete an audit to assess internal capabilities to support a campaign
- Present findings to Ursuline leadership

Phase 2 – Audit of the philanthropic community’s interest

- Develop Ursuline’s case statement and story
- Conduct confidential interviews with potential prospects
- Determine realistic campaign goals
- Present recommendations to Ursuline leadership

Phase 3 – Develop a campaign plan

- Develop campaign plan, including specific goals for dollars raised, milestones, and solicitation strategies
- Develop a campaign calendar
- Develop a campaign budget
- Assist in the development of campaign materials
- Assist in the training of the Board of Trustees and key campaign volunteers
- Present recommendations to Ursuline leadership

Phase 4 - Silent Phase Consultation

- Assist in prospect research to find additional major gift donors
- Provide strategy for acquiring and retaining major gift donors
- Develop campaign progress updates to be shared with donors
- Provide guidance to campaign leadership for peer-to-peer solicitations
- Assist with stewardship of key donors

Evaluation Process and Criteria

The RFP will be published and notice of its release sent to a select number of firms with relevant experience. The RFP and any addenda will also be available on Ursuline’s website at: <https://www.ursulineatl.org/employment-opportunities/>. Ursuline will select the firm based on its ability to meet the overall expectations of Ursuline Academy. The Ursuline Academy President and Board of Trustees will be the judge of which submission offers the greatest benefit to Ursuline Academy. The following criteria will be used in the selection process:

Expertise

- Responsiveness and completeness of the response provided to the RFP.
- Experience and qualifications of consultant and management team, including demonstrated knowledge of planning, management and evaluation skills.
- Technical methodology of consultant’s approach to organizing and managing the project; ability to document information and recommendations clearly in written format.
- Demonstration of understanding the project objectives and scope.
- Overall project management and ability to accomplish a project of this nature within the proposed time schedule

Cultural

- Cultural fit for Ursuline Academy.
- Ability of the consultant and management team to communicate and build consensus with board members, staff and donors.

- Experience with secondary or higher education fundraising campaign projects.

References

- References and examples of completed consulting projects. Satisfaction of former clients with competency of completed work.

Selection Process

Ursuline Academy's Board of Trustees, President and Director of Advancement will review and evaluate the written responses to the RFP. The Board, President and Director of Advancement, at their discretion, may seek expert advice in reviewing the responses. Firms submitting the top-ranked proposals may be invited to participate in virtual interviews during the week of October 4, 2021. Full details regarding the interview schedule and format will be announced later in the process.

The Board, President and Director of Advancement will evaluate, select organizations for interviews, check references, make the final decision, and enter into contract negotiations with the successful organization. If these negotiations fail, Ursuline Academy will proceed with contract negotiations with the firm scoring second, and so on. Unsuccessful respondents will be notified as soon as possible. Ursuline Academy reserves the right to cancel the vendor selection process at any time.

Ursuline Academy is under no obligation to make a selection under this RFP, and it reserves the right to make any selection it chooses. Ursuline Academy reserves the right to reject any and all submissions at its sole discretion, accept a proposal based on considerations other than cost, and waive or modify any provision of this RFP.

Submissions

Submit (1) paper copy and (1) electronic copy no later than 5:00 pm CST, August 10, 2021 to:

Peggy Slater, President
Ursuline Academy
341 S. Sappington Rd.
St. Louis, MO 63122
pslater@ursulinesl.org

See instructions regarding submission of estimated costs and fees for services in Required Information – Fee Structure.

Late submissions will not be accepted. Proposal information will be kept confidential until an award is made. An acknowledgement will be sent for each proposal received.

The response must include the below listed required information in the stated order. Submissions should not exceed 10 pages. This limit does not include the cover letter and

resumes. You may submit additional information on your firm, but only the proposal itself will be submitted initially to the Selection Committee. Other material will be supplied at their request.

Required Information

The following should be included in the submission in the stated order:

Introduction

1. Cover letter with firm's name, address, email, phone and fax number.
2. Contact person's name, address, email, phone and fax number.
3. Statement of philosophy.
4. A concise statement that demonstrates the organization's understanding of the project and scope of services sought by Ursuline Academy.
5. Description of the organization's approach to the project.
6. Description of the implementation of the project, including listing of specific tasks.
7. Description of what information you will provide as deliverables.
8. Proposed completion date and timeline of the project.
9. Description of any additional team members that will perform work as part of your proposal. Provide names, addresses, and relevant experience for additional consultants.

Organization History/Experience

1. Number of years in business.
2. Type of organization (Corporation, LLC, LP, etc).
3. Type of ownership, identify owners, partners, etc.
4. Geographical areas of operation.
5. Financial condition.
6. Professional affiliations.

Personnel

1. List of principals and stakeholders.
2. Description of the size and composition of your organization.
3. An organizational chart.
4. Resumes of the proposed project manager and other key personnel proposed to be assigned to this project (the "team")

Experience and References

1. Discuss your organization's experience and, in particular, the team's experience with Campaigns for educational institutions, in particular secondary education.
2. Identify five (5) completed similar projects, that the identified key personnel have completed within the last five (5) years which best represent the skills of the organization and the team. For these projects provide:
 - a. Name and address of client.
 - b. Name, telephone number, and email address of the client contact person.
 - c. Summary of the project, including the year completed.

Other Information Provide other pertinent information that you feel makes you qualified for the proposed project.

Fee Structure

1. Provide information on your proposed fee structure which separately lists each service and related fee based on the scope of the project discussed above, separately stating, if necessary, any charges for anticipated reimbursable costs. This structure should be expressed as a “fee not to exceed” figure which itemizes all services included in the proposed fee, as well as an itemized list of what would be considered “additional services” if requested by Ursuline Academy.

Anticipated Timeline

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|-------------------|--|
| July 20, 2021 | RFP issued. |
| August 10, 2021 | Proposals due by close of business. |
| September 8, 2021 | Interviewees selected and notified by telephone; other firms will be notified of the decision by letter. |
| October 4, 2021 | Presentations to Selection Committee |
| October 18, 2021 | Results Reviewed by the Board of Trustees |
| November 2, 2021 | Notification of Selection Committee Decision |
| November 18, 2021 | Board Approval of Contract |
| January 3, 2022 | If approved, Campaign Phase 1 Begins |