



## Request for Proposals for Comprehensive Campaign Consultant

**Overview:** [Triangle Land Conservancy \(TLC\)](#) seeks proposals from qualified independent consulting firms interested in becoming a strategic partner for TLC's upcoming Comprehensive Fundraising Campaign. The goal of the comprehensive campaign is to raise funding to accelerate TLC's ability to protect and steward land in the Triangle that safeguards clean drinking water, preserves wildlife habitat, protects local farms and food, and connects people with nature.

**Background:** TLC is a 501(c)(3) conservation organization dedicated to protecting land for clean water, recreation, agriculture, and wildlife in North Carolina's six-county Triangle region, a rapidly developing and increasingly diverse area. Since 1983, TLC has protected over 21,000 acres of land and 148 miles of stream through land purchases and conservation easements and manages [eight nature preserves](#) offering more than 45 miles of trails including 15 miles for mountain biking. Seven preserves are free and open to the public and one is a working farm used by more than 700 children and refugee farmers each year.

Recognizing that the region's rapid population growth and changing demographics have huge implications for the natural resources on which we depend, TLC staff and board developed a bold [Strategic Action Plan in 2018](#). The SAP set an aggressive goal to double the pace of conservation across the Triangle: we will permanently protect and steward over 25,000 acres by 2025. TLC works to identify and preserve land throughout the Triangle that are priority locations for open space and meet one or more of our four public benefits: safeguarding clean water, preserving wildlife habitat, protecting local farms and food, and connecting people with nature. We work closely with a variety of partners including landowners, local governments, scientists, community members and farmers to protect and steward conservation land.

To accelerate the pace of land protection in the Triangle and meet TLC commitments to effectively care for and monitor land already protected which includes current and future nature preserves, TLC needs significant increased funding for ongoing and future land protection and stewardship work including TLC's [Good Ground Initiative](#).

TLC is committed to diversity, equity, and inclusion in all aspects of our work. We believe that our goal of sharing land conservation benefits with every single person in the Triangle cannot be reached without actively working to end systemic racism, which for centuries has led to ongoing inequities in access to and enjoyment of the outdoors. TLC will use our unique position and resources as a land trust to ensure the benefits of land conservation are shared with everyone in our community by continuing to partner with and support organizations led by Black people and people of color, to work with businesses owned by people of color, and to connect with communities of color.

**Purpose and Scope:** TLC is looking for a collaborative partnership to facilitate the comprehensive campaign process that involves TLC's board of directors, staff and the community and sets the campaign up for success. Consultant will be responsible for developing the campaign implementation plan and associated materials including case statement and collateral materials as well as provide counsel and support for execution and management of the campaign. Final proposal should include an all-inclusive cost structure that should meet or exceed the following guidelines.

### **1. Campaign Readiness & Feasibility**

- Conduct confidential interviews with TLC leadership, staff, to test and shape campaign vision and goals.
- Identify and evaluate external resources available to support a comprehensive campaign.
- Identify challenges to a successful comprehensive campaign.
- Identify potential campaign leadership committee members and develop roles and responsibilities for staff, board of directors, leadership committee, etc.
- Complete an audit to assess internal capabilities to support a campaign.
- Facilitate TLC board of director's retreat (Feb. 2021) to engage the board in affirming TLC's current strategic goals (SAP 2025) and defining projections for next stage strategic plans. Educate board about campaign process and develop campaign vision and goals. Ensure campaign integrates with strategic plans.
- Present findings to TLC leadership and board of directors.

### **2. Campaign Planning**

- Conduct confidential interviews with potential campaign donors to determine fundraising size and degree of support for the campaign.
- Assist with seating a high-performing campaign leadership committee.
- Provide campaign training to staff, board of directors and leadership committee.
- In partnership with staff and leadership committee, develop a Comprehensive Campaign Plan, finalize fundraising goals/donor pyramid, the campaign case statement, messaging, and collateral materials.
- In partnership with staff and campaign leadership committee identify specific fundraising goals, naming opportunities and costs linked to each area included in the campaign.
- Plan should include specific goals for dollars raised, timelines/calendar, milestones, solicitation strategies, progress check points and roles & responsibilities.
- Identify prospective major individual, corporate and foundation donors for each area of the comprehensive campaign.

### **3. Support Execution and Management of the Campaign**

- Manage campaign prospect identification and evaluation; assist in the identification and securing of "lead gifts."
- Oversee prospect calls and follow-ups assisted by staff and leadership committee.
- Develop donor tracking system and assist with donor recognition.
- Promote donor stewardship and cultivation.
- Work with staff to develop and refine collateral and promotional materials and utilization of social networking opportunities.
- Work with staff and leadership committee to identify potential campaign events.

**Timeline (later dates are estimates):**

November 12, 2021	RFP submission deadline
December 3, 2021	Awarding of contract
December 16, 2021	Board of directors meeting: consultant introduction
January 3, 2021	Contract begins. Initiate campaign readiness and feasibility work
February 26, 2022	Facilitate board of directors retreat
May 1, 2022	Deliver draft of Comprehensive Campaign Plan
June 23, 2022	Present final campaign plan for board approval
December 2022	End of campaign 'Quiet Phase'
Year of 2023	'Public Phase' TLC's 40 <sup>th</sup> Anniversary Year

**Application process:**

To be considered for this contract, please submit a brief proposal by email (no more than six pages plus requested examples) outlining:

- Your approach, plans, and methods to achieve the deliverables outlined above;
- Previous experience and qualifications for this project including a recent example preferably explaining work completed with environmentally focused organization and explanation of the campaign i.e. went well or did not go well and why;
- At least two references for organizations for which you have recently facilitated a comprehensive campaign process;
- List of staff assigned to this campaign with brief resume of experience;
- A sample comprehensive or capital campaign donor marketing packet;
- 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 TLC.

Submit proposals as one PDF packet via email to TLC Director of Advancement, Christine Wilson (cwilson@triangleland.org) by November 12, 2021. Proposals will be reviewed by November 26, 2021 with contract awarded by December 3<sup>rd</sup>. We will conduct phone or in-person interviews prior to making a final decision.