

# **INFINITY CHARTER SCHOOL**

# **REQUEST FOR QUALIFICATIONS**



## INTRODUCTION

Infinity Charter School ("The School") is requesting QUALIFICATIONS for fundraising consultants, specifically those with experience in capital campaigns. Please submit your written response as identified herein. **Responses are due on or before 3:00 p.m., May 8, 2015,** and are to be delivered in a sealed envelope to:

Attn: Fundraising Consultant Infinity Charter School 51 Banks Street, Suite 1 Penbrook, PA 17103

Responses should also be emailed in an electronic, searchable PDF format to <a href="mailto:sgausman@infinityschool.org">sgausman@infinityschool.org</a>.

No other school employee or Board Member should be contacted concerning this request during the selection process. Failure to comply with this requirement may result in disqualification. It is understood that the School reserves the right to reject any or all responses or part thereof or items therein, or to waive any non-statutory informality. Omission of any information may be sufficient cause for rejection of the response. The Board of Trustees may request formal written clarification of any item at any time. The School further reserves the right to make a contract award deemed by the Board of Trustees to be in the best interests of the School. The Board's decision to accept or reject any contract shall be final.

The School's agreement with a successful vendor shall commence on the date of bid acceptance by the School and continue until such time as the work is completed. Notwithstanding the above, the School, in its sole discretion, can terminate the agreement by providing not less than fifteen (15) days written notice of termination to vendor.

### REQUEST

Firms responding to this request must prepare their responses to the following items in the exact order listed below.

- 1. **Background** Please provide background on your firm. Please include name of firm, address, telephone number, fax number, website address. Name of lead attorney, address, telephone number, fax number, website address. Name, title, e-mail address, phone and fax numbers of contact person. In addition, describe insurance coverage.
- 2. Firm Experience Please describe your experience. Summarize the strengths of your organization that would benefit The School. The proposer should have extensive experience performing similar services for public charter schools throughout Pennsylvania including but not limited to:

### a. Feasibility Studies

Infinity Charter School 51 Banks Street, Suite 1 Penbrook PA 17103 (717) 238-1880 (phone) (717) 238-1190 (fax) admin@infinityschool.org

- b. Staff Development
- c. Campaign Development
- d. Campaign Management/Execution
- e. Deliverables
- 3. **References** Please provide references. Quality and applicability of the feedback from references for public charter school work in Pennsylvania.
- 4. **Scope of Work** Please provide services offered based on the scope of work you would most likely perform. The School seeks responses from firms with offices in Pennsylvania. It is the intention of the School to obtain the best service at the most competitive prices. It is anticipated that to adequately perform these services, the firm will be required to review school data. Such a review will be permitted under the appropriate confidentiality agreements. The scope of services expected to be performed are the following:
  - a. Phase 1 Conduct a Campaign Feasibility or Planning Study
    - i. Assess fundraising capability based upon current situation and contacts.
    - ii. Develop a compelling case for future support for presentation to perspective new donors.
    - iii. Compile a list of potential local, regional and national donors.
    - iv. Conduct interviews with key communications groups
    - v. Conduct interviews with key prospects
    - vi. Present strategies for reaching new donors.
    - vii. Provide training to board members and key staff for supporting the fundraising effort.
    - viii. Provide strategies in utilizing recognition to encourage donor support.
  - b. Phase 2 Develop a Campaign Plan
    - i. Develop a capital campaign plan and calendar
    - ii. Assist in developing collateral materials and use of social networking opportunities
    - iii. Train Board, volunteers (may include parents, students) and staff
    - iv. Assist in development of a volunteer Campaign Group
  - c. Phase 3 Execute/Manage the Campaign
    - i. Manage campaign prospect identification and evaluation
    - ii. Assist in development of campaign materials
    - iii. Oversee prospect calls and follow-ups assisted by volunteers
    - iv. Promote donor stewardship and cultivation
    - v. Work with the Board to identify potential campaign events
    - vi. Develop donor tracking and assist with donor recognition
    - vii. Work with Board PR/Planning Committee on the management of public information and public relations plan
- 5. **Proposed Fee** Please provide a sample fee proposal. Please indicate whether this fee is a lump-sum fee, the desired terms of payment, and whether there is a "not to exceed" amount.
  - a. Phase 1 (Feasibility Study). Phase I will provide the School with the necessary information to determine the appropriate next steps for the design of the new School.
    - i. Please describe your fees for the completion of the Phase I.
    - ii. Will you provide a "not to exceed" amount?
    - iii. Will the Phase I fee be credited back to the School if the project identified in this phase is selected to move forward to Phase 2 and 3?
  - b. Phase 2 & 3
    - i. Please provide a fee proposal for Phase 2 & 3 as described above.

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ii. Please identify any services that are not included in the above fee.

## **General Conditions:**

The School is not responsible for any costs incurred by the proposing firms in responding to this request. The School reserves the right to cancel this request and/or reject all responses. The School may also waive any information as is determined to be in the best interest of the School. The School shall not be legally bound until such time as an agreement in writing is executed by both the proposing firm and the Board of The School.

Sincerely,

**Board of Trustees** 

We are an equal opportunity provider and employer.