



ASSOCIATION OF  
DONOR RELATIONS  
PROFESSIONALS

BUILDING  
RELATIONSHIPS  
FOR GOOD <sup>TM</sup>

# **REQUEST FOR PROPOSAL**

## **Donor Relations Fundamentals Curriculum Development**

**Date Issued: January 17, 2023**

**Closing Date & Time: February 21, 2023 at 9pm PST**

## Contents

|  |    |
|--|----|
| 1. Background and Introduction.....      | 3  |
| 2. Assignment.....                       | 5  |
| 3. Mandatory Components.....             | 6  |
| 4. Bidder Instructions.....              | 7  |
| 5. General Terms and Conditions.....     | 8  |
| 6. Payment Terms and Invoicing.....      | 9  |
| 7. Contract Term.....                    | 10 |
| 8. Evaluation Process and Award.....     | 10 |
| 9. Privacy and Personal Information..... | 12 |
| Appendix A: Confidentiality.....         | 13 |

# 1. Background and Introduction

## 1.1 Association of Donor Relations Professionals (ADRP)

**The Association of Donor Relations Professionals (ADRP)** is a diverse community of donor relations/stewardship professionals sharing education, knowledge, and experience, empowering members to advance their careers and drive excellence in the field. ADRP is universally recognized as the authority on donor engagement for the philanthropy profession. ADRP welcomes donor relations professionals from around the globe, providing members access to a community of colleagues who do what they do every day, and who openly share their wisdom, experiences, and resources. Membership with ADRP provides practitioners the opportunity to expand their network, stay on top of emerging trends, and accelerate their careers.

With a dedicated membership of nearly 2,000, and many other industry professionals relying on ADRP for educational resources, the organization relies on our industry's experts and thought leaders in areas of specialty and different stages of education and career development.

ADRP owes its very existence to a group of passionate volunteers who, over 30 years ago, saw that there was an entire body of work that could advance an organization by expressing appreciation and demonstrating impact to its donors. Fast forward to now, and donor relations, and its practitioners, have become essential to any fundraising organization.

## 1.2 ADRP's Vision, Mission and Values:

**Our Vision:** ADRP is universally recognized as the authority on donor engagement for the philanthropy profession.

**Our Mission:** ADRP is the diverse community of donor relations professionals sharing education, knowledge, and experience, empowering members to advance their careers and drive excellence in the field.

### **Our Values:**

- Visionary leadership
- Absolute integrity
- Member empowerment and connection
- Service and program excellence
- Diversity, inclusion, and equity in all endeavors

1.3 ADRP has articulated strategic priorities for growth of the Association as follows:

- **Education**
  - ADRP members and the profession benefit from coordinated, high-quality, and targeted educational and professional development offerings.
- **Membership**
  - A strong ADRP membership through the attraction and retention of a diverse spectrum of donor relations professionals and partners around the world.
- **Revenue**
  - Net revenue growth annually while creating a sustainable model of diverse revenue streams.
- **Marketing and Communications**
  - A broad, positive awareness of ADRP and its programs and services to the membership and establish ADRP as the authority on the profession of donor relations globally.
- **Organizational Structure and Sustainability**
  - An organizational structure to fulfill the mission through a blend of sound management, strong governance, and a focus on assessing and achieving results.

1.4 Summary of Need

ADRP has made the decision to expand its existing educational offerings. This menu is currently comprised of webinars, networking resources, and regional and international conferences. Upon project completion, it will also include an accredited donor relations certification program.

To test both delivery methods and the appetite of membership and beyond for this type of programming, a robust, inclusive, and comprehensive tiered certificate program (Fundamentals, Advanced, Expert) will be developed, with initial focus on the Fundamentals, focusing on the following four topics:

- Fundamentals of Acknowledgements
- Fundamentals of Accountability & Compliance (Gift Agreements, Gift Documentation)
- Fundamentals of Reporting (Impact, Scholarship, Beneficiary, Recipient, Financial)
- Fundamentals of Recognition (Plaques, Honor Rolls, Giving Societies, Communications)

## 2. Assignment

- 2.1 ADRP is seeking proposals to retain the services of a qualified individual or entity for the development of a Fundamentals of Donor Relations curriculum, with a preference for qualified donor relations professionals with curriculum development experience. The successful Proponent will create a full curriculum of four to five courses targeted to new and early career donor relations professionals (1-3 years of experience), to provide them with a fulsome, foundational understanding of the art and science of donor relations.

Working closely with ADRP stakeholders to determine desired outcome and function for this project, the Proponent will:

- Outline benefits or challenges of different educational modalities (asynchronous, collaborative, lecture, case study, etc.)
- Demonstrate differing methods for grading
- Demonstrate the various delivery platforms and their benefits
- Complete a review of content with the ADRP office to ensure technological requirements are available
- Provide a live demonstration for key stakeholders (including, but not limited to, meetings with volunteers or membership to share delivery methods or review course content)

The successful Proponent is encouraged to be creative and is required to:

- Produce a brief outlining the complete curriculum and its supports (technology, method of delivery, grading, etc.)
- Produce a road map for the introduction and implementation of this curriculum that identifies key milestones and the timeline to achieve
- Outline tools and materials that will be used to train instructors to administer the curriculum

## 2.2 Expected Outcomes and Deliverables

### 2.2.1 Fundamentals of Donor Relations Curriculum

The successful Proponent will provide a complete course curriculum of four or five modules which include but are not limited to Acknowledgements, Gift Accountability and Compliance, Reporting and Recognition. The courses must:

- Be teachable by any experienced instructor, or appropriate for asynchronous learning
- Include measurement and/or testing tools, with technology supported by ADRP
- Demonstrate diversity, equity, and inclusion (DEI) and universal accessibility (geographically, by organization type & size, differing learning styles, etc.)

### 2.2.2 Toolkit for Instructors

The successful Proponent will develop a tool kit for instructors with sample lesson plans for each module. Such toolkit can include items such as lesson plans, student materials, instructor guide, “train the trainer” type materials, and discussion questions.

### 2.2.3 Curriculum Roadmap

The successful Proponent will develop a road map with concrete recommendations for the actual introduction and rolling out of the Fundamentals curriculum and modules, identifying key milestones and the timeline to achieve.

## 2.3 Timeline of Deliverables

Following the award, a meeting and review of project timeline and scope of work will be scheduled between ADRP project leads and the successful Proponent. All other deliverables to be determined subsequently and delivered according to a mutually agreed upon timeline.

## 2.4 Qualifications

The RFP is open to individuals, companies, research institutes, etc. The successful Proponent is expected to have:

- Substantial experience in the field of donor relations and stewardship
- Expertise in curriculum development, implementation, and assessment
- Excellent communication skills
- Demonstrated project management skills, particularly as it relates to complex projects
- Proven ability to work with cross-functional internal teams as well as outside stakeholders

## 3. Mandatory Components

3.1 Approach and Methodology: Proponent to describe approaches in methodology that demonstrate a comprehension of the services required and the ability to provide such services. Proponents are to include a framework of how they will integrate the stakeholders into the process and gain alignment. Stakeholders include, but are not limited to: Staff, Board, Volunteers and Members.

3.2 Qualifications: Proponent to outline the relevant professional background and expertise offered and team bios, if applicable. Proponents are to provide detail on how they developed expertise and knowledge relevant to curriculum development and the scope of this project.

- 3.3 Experience and Proven Ability: Proponent to demonstrate proven ability to develop and implement effective and innovative curriculum development including no more than three recent, relevant, and successful summaries of previous work in curriculum development (no more than one page each). The project(s) should be of a similar scope and size as identified in this RFP document. Proponents are to provide 2-3 relevant professional references, including contact name, role, email address and description of completed project(s).
- 3.4 Work Plan and Timeline: Proponent to provide a work plan and timeline to demonstrate how it will achieve the objectives.
- 3.5 Pricing
- 3.5.1 Pricing must be in US dollars (USD) and must include all costs associated with the service, excluding taxes.
- 3.5.2 Prices must be guaranteed for the duration of the contract.

## 4. Bidder Instructions

- 4.1 Interested Proponents must provide their primary contact email address through the online submission form provided by the RFP Administrator immediately upon receipt of the bid documents.
- 4.1.1 Submitted proposals must include the following:
- Approach and Methodology
  - Qualifications
  - Experience/Proven Ability
  - Workplan and Timeline to Achieve
  - Pricing
- 4.2 All communications regarding this Request for Proposal (RFP) must be directed to [office@adrp.net](mailto:office@adrp.net) with the subject line "RFP Curriculum Questions" via email.
- 4.3 Proposals will be received by ADRP no later than Tuesday, February 21, 2023 at 09:00pm Pacific Time. Submissions can be submitted [here](#).
- 4.4 Proposals received after the closing time will not be accepted.
- 4.5 Proponents must acquaint themselves with the terms and conditions of this document and respond to all sections of the RFP by indicating the reference number for each

section and clearly identify, by clause, any exceptions. Failure to do so will be deemed that all the terms and conditions have been accepted by your organization.

- 4.6 Proponents may submit proposals for all or any part of the service requirements being offered in this RFP.
- 4.7 ADRP reserves the right to choose more than one Proponent to supply different parts being offered.
- 4.8. Questions pertaining to this RFP must be received no later January 31, 2023 at 09:00pm PT. Questions are to be directed to [office@adrp.net](mailto:office@adrp.net) with the subject line "RFP Curriculum Questions" via email.
- 4.9. All questions and answers during the RFP period will be communicated by email with the primary contacts. Responses to questions will be distributed to all Proponents, through the Proponent's primary contact via email, in a timely fashion.
- 4.10 No amendments or changes to proposals will be accepted after the closing date and time.
- 4.11 Submissions must be prepared in accordance with the conditions outlined in this and any associated documents. Failure to comply may result in the disqualification of the proposal.

## 5. General Terms and Conditions

- 5.1 ADRP is not responsible for any expenses incurred by Proponent(s) in preparing and submitting a response to this RFP.
- 5.2 Proponents may not use ADRPs name or markings for any external marketing purposes without the express written permission from ADRP.
- 5.3 Proposal pricing shall be irrevocable for ninety (90) days following the closing date of the RFP.
- 5.4 The lowest cost Proposal or any other Proposal may not necessarily be accepted.
- 5.5 ADRP is not under any obligation to award a contract and reserves the right to terminate the Request for Proposal process prior to award and to withdraw from discussions with any or all of the Proponents who have responded, without liability being incurred by ADRP for any expense or cost incurred by the Proponent(s).
- 5.6 The successful Proponent(s) shall not assign or subcontract any portion of its contract

without the written consent of ADRP.

- 5.7 Any terms or conditions, which cannot be fulfilled, should be clearly stated in your submission.
- 5.8 All the terms and conditions stated in this bid document are deemed to be accepted by the Proponent and incorporated into the Proponent's proposal submission. The complete submission document and any attachments shall become part of any contract entered into between the successful Proponent(s) and ADRP.
- 5.9 Any conflict in the wording of the successful Proponent(s)' invoice and/or sales agreement and the wording of the terms and conditions of this proposal, shall be resolved in favor of ADRP and shall be deemed to be incorporated into the Proponent(s)' invoice and/or sales agreement.
- 5.10 If the successful Proponent(s) fails to carry out the agreement satisfactorily in accordance with the terms, ADRP will, by giving written notice, specify the default(s) requiring remedy. If the specified default(s) is/are not remedied within two weeks from giving such notice, ADRP reserves the right to terminate the agreement immediately.
- 5.11 This is a fee for service contract and all produced materials will be owned and copyrighted by ADRP.
- 5.12 The Proponent(s) shall treat the contract and all documents connected with this Request for Proposal as confidential and shall not disclose any information or documents acquired by it or its employees, agents or subcontractors to any third parties, nor use, or copy the information, except as required to perform the Proponent(s) obligations in fulfilling the terms of this contract.
- 5.13 The acceptance of the successful Proponent's bid and the subsequent award of the contract contemplated by this bid document are subject to ADRP's internal approval processes, approval of external funding and/or budgets.

## 6. Payment Terms and Invoicing

- 6.1. Payment terms are net 30 days after delivery. Please specify in your proposal any payment terms that may differ. Example: Progress payments.
- 6.2. ADRP will not consider any prepayment terms. ADRP will issue a purchase order for specific work and the successful Proponent(s) will invoice against these purchase orders once services are rendered.
- 6.3. All invoices must quote the ADRP purchase order number. Failure to include the purchase order number will result in invoices being returned and delays in payments.

## 7. Contract Term

- 7.1. Contract term shall be determined through negotiation between ADRP and the successful Proponent

## 8. Evaluation Process and Award

- 8.1. Submitted proposals will be evaluated by a selection committee with the use of a standard rubric based on weighting outlined in section 9.5. The committee will consist of members of the ADRP Board, Education Committee, ADRP Office and representatives from the general membership.
- 8.2. In evaluating proposals submitted pursuant to this request, ADRP places high value on the following factors, not necessarily in order of importance:
  - a. Proven ability to develop an innovative and comprehensive curriculum will be considered an asset.
  - b. Approaches in methodology, process, and tools with respect to the anticipated scope of services that demonstrate maximum comprehension of, and ability to, provide such services to ADRP.
  - c. Demonstration of ability to proactively lead, manage, and grow a business partnership with multiple stakeholders and partners.
  - d. To award different items to different Proponents or one Proponent based upon ADRP's evaluation of proposals.
  - e. To, in its sole discretion, request clarification and/or further information from one or more Proponents after closing without becoming obligated to offer the same opportunity to all Proponents.
  - f. Value for the services provided.
- 8.3. All information within this request for proposal is to be held in confidence. The decision to award a contract for this assignment will be based on the factors listed above.
  - a. ADRP will regard and preserve as confidential and proprietary to the disclosing party all information, written, oral, or computer-based, to which it has access as part of this Request for Proposals, except with prior approval of the Proponent. All documents provided as part of this RFP will remain the property of ADRP and shall be returned upon completion of this proposal and/or the contract negotiating process.

- b. Proponent will include an executed Confidentiality Agreement with their submission. (Appendix A)

8.4. Interviews will be arranged for a short-listed number of Proponents. The exact time, location, and agenda will be provided at a later date.

- a. ADRP reserves the right to enter into negotiations prior to awarding the Proponent(s) who offers the best overall value to them. During such negotiations, the scope of the project may be refined, responsibilities will be designated, implementation issues clarified, and the final terms and conditions of any contract will be determined.
- b. If negotiations with the selected Proponent are unsuccessful, ADRP reserves the right in its sole discretion to enter into negotiations with any other Proponent(s).
- c. The successful Proponent(s) awarded the contract will be contacted by ADRP's Executive Director.

8.5 In the event of a tie among competing Proposals, the combined weighted scoring of price and conformance with specifications will be separately considered and the tied Proponent with the lowest price will be the successful Proponent.

8.6 **Rated Criteria Weightings**  
The following is an overview of the categories and weighting for the rated requirements of this RFP:

| <b>Rated Criteria</b>         | <b>Weighting (Points)</b> |
|-------------------------------|---------------------------|
| Approach & Methodology        | 25 points                 |
| Qualifications                | 20 points                 |
| Experience/Proven Ability     | 20 points                 |
| Work Plan and Timeline        | 20 points                 |
| Pricing                       | 15 points                 |
| <b>Total Available Points</b> | <b>100 points</b>         |

8.7 **Proposal Submission and Selection Timeline:**

|                               |          |
|-------------------------------|----------|
| Issue Date of RFP             | 01/17/23 |
| Deadline for Bidder Questions | 01/31/23 |
| Question Responses Delivered  | 02/07/23 |

|   |          |
|---|----------|
| Proposal Submission Deadline  | 02/21/23 |
| Presentations for Short-list Proponents                                       | 03/20/23 |
| Anticipated Selection of Bidder   | 04/03/23 |
| Period for which Proposals are Irrevocable after Proposal Submission Deadline | 120 days |

The RFP timetable is tentative only and may be changed by ADRP in its sole discretion at any time prior to the Proposal Submission Deadline.

#### 8.8 Debriefing:

Not later than 60 Days following the date of posting of a contract award notification in respect of the RFP, a Proponent may contact the RFP Administrator to request a debriefing from ADRP, with participation of the RFP Administrator and a representative of the Education Committee.

Any request that is not received within the foregoing timeframe will not be considered and the Proponent will be notified of the same in writing.

Proponents should note that, regardless of the time of submission of a request by a Proponent, debriefings will not be provided until a contract award notification has been posted.

## 9. Privacy and Personal Information

- 9.1 By submitting any personal information requested in this RFP, Proponents are agreeing to the use of such information as part of the evaluation process, for any audit of this procurement process and for contract management purposes. Where the personal information relates to an individual assigned by the successful Proponent to provide the deliverables, such information may be used by ADRP to compare the qualifications of such individual with any proposed substitute or replacement made during contract performance. If a Proponent has any questions about the collection and use of personal information pursuant to this RFP, questions are to be submitted to the RFP Administrator.

## Appendix A: Confidentiality

All correspondence, documentation, and information of any kind provided to any Proponent in connection with or arising out of this RFP or the acceptance of any Proposal:

- a. remains the property of ADRP;
- b. must be treated as confidential and shall not be disclosed except with the prior written consent of ADRP;
- c. must not be used for any purpose other than for replying to this RFP and for the fulfillment of any related subsequent agreement; and
- d. must be returned to ADRP upon request.

### Confidential Information of the Proponent

- a. Except as provided otherwise in this RFP, or as may be required by Applicable Laws, ADRP shall treat the Proponents' Proposals and any information gathered in any related process as confidential, provided that such obligation shall not include any information that is or becomes generally available to the public other than as a result of disclosure by ADRP.
- b. During any part of this RFP process, ADRP, or any of their representatives or agents, shall be under no obligation to execute a confidentiality agreement.
- c. In the event that a Proponent refuses to participate in any required stage of the RFP (such as an oral presentation) because ADRP has refused to execute any such confidentiality agreement, the Proponent shall receive no points for that particular stage of the evaluation process.

### Proponent's Submission

- a. All correspondence, documentation, and information provided in response to or because of this RFP may be reproduced for the purposes of evaluating the Proponent's Proposal.
- b. If a portion of a Proponent's Proposal is to be held confidential, such provisions must be clearly identified in the Proposal.

### Non-Disclosure Agreement

ADRP reserves the right to require any Proponent to enter into a non-disclosure agreement satisfactory to ADRP.