

Board Meeting Date:	June 19, 2017
Solicitation No.:	17-054MH
Description:	<p data-bbox="505 312 1372 344">Fundraising Consultant Services:</p> <p data-bbox="505 380 1372 411"><u>Recommendation</u></p> <p data-bbox="505 447 1372 646">The Administration is seeking Board approval to enlist the professional services of Dini Spheris, an employee-owned non-profit fundraising consulting firm located in the city of Houston, and authorization for the Superintendent to negotiate and execute the contracts and subsequent renewals.</p> <p data-bbox="505 720 1372 751"><u>Summary</u></p> <p data-bbox="505 787 1372 987">The primary role of Dini Spheris will be to assist the CTE Department in developing a strategic fundraising plan through a multiyear donor campaign to raise money or obtain in-kind materials/services needed to support the expansion of CTE programs, which will service the needs of our community now and for generations to come.</p> <p data-bbox="505 1022 1372 1255">The center will afford students the opportunity to access programs including Health Science, Information Technology, Manufacturing, Law and Public Safety, Education and Training, Engineering, Hospitality and Tourism, Robotics and Transportation, and many more. Dini Spheris will work with District stakeholders to develop partnerships that will lead to the acquisition of industry standardized equipment.</p> <p data-bbox="505 1291 1372 1665">Funds have been planned for and allocated in the CTE 2018 fiscal budget. The idea of employing a fundraising consultant was researched as a means to facilitate the creation of strategic partnerships that will result in financial investment and support for the James Reese Career and Technical Center. The Purchasing department worked with the CTE Department in order to issue a Request for Proposal. All required documents were submitted through the RFP process and have been reviewed. If approved, Dini Spheris will work with FBISD CTE and District stakeholders on a three phase plan to develop critical partnerships for the following:</p> <p data-bbox="505 1701 1372 1732">Phase One: Campaign Planning Study Process</p> <ul data-bbox="548 1738 1372 1871" style="list-style-type: none"> <li data-bbox="548 1738 1372 1770">• Develop Initial message <li data-bbox="548 1776 1372 1808">• Identify key prospects <li data-bbox="548 1814 1372 1871">• Build the nucleus of a transformational volunteer fundraising team

	<ul style="list-style-type: none"> • Gather data to develop fundraising strategies <p>Phase Two: Discovery and Report Process</p> <ul style="list-style-type: none"> • Dini Spheris will follow up with prospects directly • Raise the prospect's donative intent • Provide conclusions and recommendations concerning preparation for campaign launch • Provide a tracking system for donors • Recommend budget considerations <p>Phase Three: Campaign Implementation</p> <ul style="list-style-type: none"> • Refine and confirm campaign objectives • Create the overall campaign prospect list • Implement recruitment strategies for campaign committee • Develop key overarching strategies • Corporate engagement • Donor Stewardship • Communication to key constituencies • Develop campaign policies and protocols <p>The CTE department will collaborate with Dini Spheris to seek financial support through enterprise naming rights, in-kind equipment donations, and other partnership opportunities. Fees and estimated expenses for services will not exceed \$123,500. Fees are payable in monthly installments with an anticipated project timeline of eight months.</p> <p>Phase 1 and 2 is not to exceed \$46,000 and Phase 3 is not to exceed \$77,500</p>
Requested By:	Meredith Watassek, Director of CTE
Vendor(s):	DiniSpheris
Budget Sources:	General Funds
Amount:	\$123,500 total expenditure for three phases
Other Supporting Information	
Number of vendors contacted by Purchasing:	1
Number of vendors contacted by FBISD Notification System:	1856
Number of vendors downloaded the solicitation:	210
Number of responses received:	3
Number of "no bid" responses received:	0
Length of commitment:	Annual contract with four (4) renewal options
Last solicitation date:	N/A
Supporting documents:	Evaluation Criteria and Rubric

**Disclosure under Board Policy CH, CV, or DBD
(Local):**

None

Evaluation Summary
 RFP-17-054MH
 Fundraising Consultant Service
 Board Date: June 19, 2017

Vendor	Purchase price (20 pts. max)	Reputation of the Vendor and of the Vendor's goods or services (5 pts. max)	Quality of the Vendor's goods or services (15 pts. max)	Extent to which the goods or services meet the District's needs (20 pts. max)	Vendor's past relationship with the District (5 pts. max)	Long-term cost to the District to acquire the Vendor's goods or services (15 pts. max)	Vendor's Principal place of business is in the state of Texas, or employs 500 people in this state. (5 pts. max)	Insurance requirements (5 pts. max)	Extent to which the vendor agrees to our Standard Form of Agreement (10 pts. max)	The impact on the District to comply with laws and rules relating to Historically Underutilized Businesses (HUB) (0 pts. max)	Proposer's Total Score (100 pts. max)	Proposer's Ranking
DiniSpheris	20.00	3.00	14.00	18.00	0.00	14.00	5.00	5.00	10.00	0.00	89.00	1
ESF	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mixed Bag Design	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

N/A - Not compliant, as these vendors are selling products. They don't offer Consulting Services.

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Evaluation criteria: Proposal shall be evaluated using the evaluation criteria listed below. Fort Bend ISD reserves the right to award contract as best meets the District's needs such as per section, groups, or all.

	Evaluation Criteria	Point System
1	Purchase price Offer a fair reasonable price for items to be procured by Fort Bend ISD. Pricing will be calculated using the Price Delivery Sheet in this document.	20 points
2	Reputation of the Vendor and of the Vendor's goods or services Vendor should have a solid reputation with other ISD's, Government or Collegiate entities that show a high level of customer service, a high level of quality of good or services. (References will be contacted via e-mail with a deadline. If no response is received by the deadline, there will be points deducted in this section.)	5 points
3	Quality of the Vendor's goods or services Vendor's products should be new and be of the highest quality with an option to substitute for a company branded item of equivalent quality.	15 points
4	Extent to which the goods or services meet the district's needs Timely Installations	20 points
5	Vendor's past relationship with the District	5 points
6	Long-term cost to the District to acquire the Vendor's goods or services Warranty, setup fee; maintenance or other fees	15 points
7	Vendor's Principal place of business is in the state of Texas, or employs 500 people in this state.	5 points
8	Insurance requirements: A copy of the Certificate of Liability Insurance should be in your proposal.	5 points
9	Extent to which the vendor agrees to our Standard Form of Agreement embedded herein as Appendix A. By Signing the Agreement, you assent to the Terms and Conditions of Fort Bend ISD (10 pts.)	10 points
10	The impact on the ability of the District to comply with laws and rules relating to Historically Underutilized Businesses (HUB).	0 points
	TOTAL	100 points