



## **Request for Proposals: Partnership and Business Development Consultant**

Evergreen Social Impact is soliciting proposals for a consultant to lead our partnership and business development efforts in 2025.

**Request for Proposals (RFP) Issued:** Monday, October 21, 2024

**Proposals Due:** The proposal must be received via email no later than 4:00 p.m., Pacific Time, on Friday, November 8, 2024.

**Estimated Term:** The estimated term of this subcontract will be mid-December 2024 through June 2025, with the possibility of being extended for an additional six months upon mutual agreement of the parties.

**Proposal Not to Exceed: \$45,000**  
**Compensation will be based in full or in part upon completion of deliverables.**

**RFP Contact:** Beth Harvey, Executive Director  
**RFP Contact's Email:** [beth@evergreensocialimpact.org](mailto:beth@evergreensocialimpact.org)

Please note that an addenda and/or question and answer documents related to this RFP may be issued. Any such documents will be posted on the agency's website. Please check our website ([www.evergreensocialimpact.org](http://www.evergreensocialimpact.org)) before submitting proposals to ensure that you are responding to the most current RFP information.

### **Evergreen Social Impact (ESI) Background**

ESI is a 501(c)(3) tax exempt, Washington State nonprofit corporation. ESI was founded in April 2021 and launched operations on July 1, 2021. ESI is a fiscal sponsor organization that provides fiduciary services, including governance, funds management, and other operations services to nonprofits and charitable projects with social-impact missions. ESI can act as a long-term administrative home for unincorporated or incorporated nonprofit entities and public/private partnerships, or as a 'nonprofit incubator' for new entities that are in start-up mode. By providing operational infrastructure to its projects, ESI enables them to conserve resources and focus on their missions.

ESI currently provides the following services to its sponsored projects:

- Turnkey 501(c)(3) status, including receipt, processing and acknowledgement of tax-deductible contributions
- Built-in infrastructure, including state-of-the-art accounting, HR, payroll and donor management systems

- Grant and contract management, including government grants and contracts
- Risk and compliance management
- Annual audit and 990 tax return
- Extensive expertise in nonprofit operations

Our focus in fiscal sponsorship is the support of sponsored projects that are committed to system change: Projects that work to create a society built on the principles of social justice, equity, robust communities, healthy people, and a sustainable environment. To date, we have for example supported projects working in the fields of cancer research funding, climate change, preservation of old-growth forests, and mental health services for under-resourced and underserved communities.

## **Opportunity and Scope of Work**

### Opportunity

ESI is entering into a period of transition and growth, and our top organizational priority is to develop a robust and sustainable earned income stream through the expanded recruitment and onboarding of new sponsored projects, including:

- Unincorporated charitable projects with annual budgets of over \$100,000
- Incorporated nonprofit organizations with annual budgets of over \$250,000
- Public/private partnerships and quasi-governmental entities

We offer two [models of fiscal sponsorship](#):

- Model A (Comprehensive): The sponsored project becomes a program of ESI and operates under its corporate umbrella.
- Model C (Pre-approved Grant): The sponsored project is independent of ESI; ESI is the direct grantee for specific grant(s) and re-grants funds to the sponsored project.

We have an ambitious goal of significantly accelerating our rate of growth and recruiting/onboarding at least five Model A and up to five additional Model A or Model C sponsored projects by June 2025. Accomplishing this goal entails elevating ESI's public profile in the Washington and Pacific Northwest nonprofit communities, developing strong relationships with key members of the nonprofit community and other pertinent entities (e.g. governmental agencies, colleges and universities, community/private foundations/collaborative funders, etc.) and building a robust pipeline of sponsored projects. We are seeking a consultant to lead and implement this work, in collaboration with our Partnership Development Manager.

### Services to be Performed

Your proposal is expected to cover the following services, working in collaboration with the ESI staff and board:

- Develop a three-year business development plan with both short-term and long-term targets; the primary focus of this plan to be on short-term goals and strategies.
- Implement Year 1 business development plan activities.
- Work with the Executive Director to finalize agreements for newly acquired sponsored projects.

### Deliverables

The work performed is expected to produce the following for ESI:

- Establish community-based relationships designed to raise awareness and recruit new sponsored projects.
- Identify, recruit, and support the onboarding of a minimum of five (5) new sponsored projects, with annual budgets of \$250K-\$500K, by June 2025.
- Build a pipeline with a minimum of 5-10 potential projects, including at least three (3) projects with annual budgets between \$500K-\$1M.
- Identify and do initial outreach to potential projects with annual budgets of \$1M+.

Estimated Schedule of Procurement Activities

The following is the anticipated timeframe of the RFP, services, and deliverables to be provided.

Issue Request for Proposals	October 21, 2024
Question and Answer Period	October 21-November 1, 2024
Proposals due	November 8, 2024
Evaluate proposals	November 11-19, 2024
Announce “Apparent Successful Contractor” and send notification via e-mail to unsuccessful proposers	November 20, 2024
Hold debriefing conference (if requested)	December 2, 2024
Negotiate and execute contract	December 3-5, 2024
Begin contracted work (anticipated)	December 16, 2024

ESI reserves the right, at its sole discretion, to revise the above timeframe, with or without notice.

**Proposal Submission**

*Required Components and Content*

To simplify the evaluation process and obtain maximum comparability, please organize your proposal into the following components:

1. Executive Summary  
Describe your understanding of the work to be performed, the estimated fees (hourly rate, estimated hours required to execute on the scope of work, a total not to exceed proposed fee), and your ability to perform the work within the time frame provided.
2. Approach  
Provide a clear and compelling outline of your approach to this engagement. Describe your strategy for achieving the deliverables, including your methodology for building partnerships, recruiting new projects, and elevating our organization's profile. We are particularly interested in understanding how your proposed approach will align with and accelerate ESI’s growth objectives.
3. Proposed Scope of Work and Timeline
4. Proposed Budget  
Evergreen Social Impact has budgeted an amount not to exceed \$45,000 for this project. Proposals in excess of this amount will be considered non-responsive and will not be

evaluated. Any contract awarded as a result of this RFP is contingent upon the availability of funding.

The evaluation process is designed to award this procurement not necessarily to the Proposer of least cost, but rather to the Proposer whose Proposal best meets the requirements of this RFP. However, Proposers are encouraged to submit Proposals that are consistent with the conservation of resources.

Identify all costs in U.S. dollars detailing expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The Proposer is to submit a fully detailed budget including staff costs and any expenses necessary to accomplish the tasks and to produce the deliverables under the contract. Proposers are required to collect and pay any applicable taxes arising out of the agreement for services.

Costs for work to be completed by subcontractors are to be broken out separately.

5. Professional Experience

Describe qualifications for this engagement. This could include resume(s), CV(s), and links to websites and/or LinkedIn profiles that highlight capacities to successfully perform the tasks outlined in this RFP.

6. Additional Questions/Information

- a. Identify whether the proposal is from a registered minority-owned, women-owned or veteran-owned small business (per the Office of Women and Minority Business Enterprises under the Revised Code of Washington chapter 39.19 or as certified by the Washington Department of Veteran Affairs). Certification(s) documenting the registered minority-owned, women-owned or veteran-owned small business current status is **required**.
- b. Describe your commitment to diversity, equity and inclusion. Can you share a specific experience from your past work where you intentionally centered equity, belonging, and justice? What motivated you to take this approach, and how did it impact the community or individuals involved?
- c. Describe what makes this opportunity exciting for you. How do you envision tackling the deliverables to achieve impactful results?
- d. Provide any additional information, not specifically requested, but which you believe would be useful in evaluating your proposal, including any value adds the proposer may offer to ESI if awarded this contract.

*Method of Submittal*

Proposals should be submitted via email, no later than November 8, 2024, with "Proposal: Partnership and Business Development" in the subject line, to Beth Harvey at [beth@evergreensocialimpact.org](mailto:beth@evergreensocialimpact.org). Proposals must be submitted in PDF format; zipped files cannot be used for submission of proposals. Questions regarding this RFP may also be addressed to this same email address.

Proposals not submitted per the above proposal submission guidelines may be considered non-responsive and not be evaluated.

## **Evaluation of Proposals**

Proposers may be asked to submit additional materials, including references.

Total compensation under this contract will be based on the following criteria:

- Price (inclusive of travel and other routine business expenses)
- Prior experience and demonstration of success in similar work
- Qualifications (familiarity experience with nonprofit fiscal sponsor organizations will be a plus)
- Responsiveness of the proposal
- References, if requested

ESI will evaluate and award the contract to the proposal deemed to be in the best interest of ESI.

This RFP does not obligate ESI to contract for services specified herein. ESI reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

ESI collects contact information for all potential contractors for the purpose of notifying them for future contracting opportunities. If you do not wish to be added to our contact list, please so state in your proposal.

All entities or individuals contracting with ESI must be prepared to provide proof of liability insurance coverage if selected to perform the work outlined in this RFP.

Thank you for your time and consideration of this Request for Proposals.

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