



- 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.

- 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.