



REQUEST for PROPOSAL
Planned Giving Officer (Remote/Contractor)
Reports To: Executive Committee / Board of Directors

Description of Organization:

Neuse River Golden Retriever Rescue, Inc. is dedicated to the rescue, rehabilitation and adoption of golden retrievers in need. The organization advocates responsible pet ownership, community education and protection of all dogs.

As of 2021, Neuse River Golden Retriever Rescue, Inc. had saved and enriched the lives of more than 4,300 dogs and their forever families.

Our territory includes the eastern half of North Carolina from the Triangle area (Raleigh, Durham, Chapel Hill), north to Virginia, south to South Carolina and east to the Atlantic coast, and we accept any golden retriever into our program – regardless of age or medical condition. We help families who can no longer care for their goldens by offering an opportunity to surrender their dogs – knowing that a final outcome is happy and includes a new, loving home. We also partner with shelters to save strays and assure goldens are not euthanized because no one wants them.

We have a hard-working heritage that began as a club in the early 1980s and the “passing of a hat” to pay vet bills. Over the past few decades, our network of volunteers and donors support rescuing more than 200 dogs a year at a cost of over \$200,000 in veterinary care.

Purpose of RFP Summary:

Neuse River Golden Retriever Rescue is looking for a results-driven development and/or financial professional to launch the nonprofit’s Planned Giving Society. This will be a temporary project, anticipated to last between six and nine months. It is expected that the project will require approximately 30-40 hours per month. Under the direction of the Executive Committee, the Project Manager will work with donors, their attorneys and advisors, and NRGRR board members and volunteers to create a comprehensive planned giving program that includes identifying planned giving prospects, soliciting gifts, stewarding legacy donors and managing and recognizing current planned gifts. The ideal contractor must be able to work independently with minimum supervisions to achieve annual goals and key performance metrics. This is a remote project that will be managed by the selected independent contractor.

Timeframe:

The completion date for the establishment and launch of the Golden Guardian Legacy Society is October 31, 2022.



Scope of Services Required:

Design, implement and maintain a successful Golden Guardians planned giving program that includes developing a budget for the program and creating an annual action plan with goals, strategies, timelines, and metrics. Present budget and plan to Board of Directors for approval and provide quarterly updates.

- Write, create, and distribute digital and hardcopy materials that clearly explain NRGRR's planned giving options and how to start the process of making a legacy gift.
- Work closely with Board members to research, identify, cultivate, solicit and steward planned giving prospects through face-to-face visits, calls, written communications, emails and direct response tactics to acquire and document immediate, deferred and future planned gifts.
- Establish methodology for meeting with planned giving prospects. Meet with 1-2 planned giving prospects per month and/or coordinate Board members to meet with prospects and take strategic steps to move prospects through the gift cycle of identification, qualification, cultivation, solicitation, and stewardship.
- Serve as NRGRR's point of contact for communication with attorneys, trust officers, and financial managers and assist with all required forms and documents for planned gifts. Fully document professional activities and donor contacts, gifts, and prospects in DonorPerfect database; ensure timely and appropriate planned gift acknowledgments.
- Plan and manage planned giving marketing efforts, including, but not limited to, direct response programs, newsletters, website, advertising materials, and other educational sessions and materials for both donors and professional advisors.
- Continue launch of Golden Guardians Society, which will include:
 - Contacting current legacy donors to determine if/how current donors want to be included and recognized in the society.
 - Promoting society pre-launch to current volunteers and donors to invite them to join before it officially launches.
 - Coordinating the creation of marketing materials for the society, including a logo, .pdf brochure, website materials, newsletter/e-news, etc.
 - Determining appropriate recognition of society members.
 - Distributing press releases and announcements.
 - Update planned giving pages of the website.
- Maintain an in-depth knowledge of NRGRR programs, activities, and impact.
- Follow IRS regulations regarding fundraising; ensure external communications are compliant.
- Stay up to date on applicable tax laws, gift administration, planned giving instruments, and endowment strategies.
- Maintain confidentiality of donor information.



Fee Schedule:

The project is to be completed within 6 months. The maximum fee is not to exceed \$10,000. Costs for materials related to the Golden Guardian Society and costs associated with project tasks are to be negotiated with the Executive Committee.

Qualifications:

- Bachelor's degree required, advanced degree or certification preferred, AND at least two years of experience working with estate management or planned gifts in a legal, nonprofit, or financial institution.
- Working knowledge of estate planning strategies and tax treatments (i.e., trusts, charitable gift annuities, life insurance, retirement plans).
- Proven ability to communicate effectively, both in writing and verbally.
- Strong analytical skills, attention to detail, and organizational skills.
- Proficient user of the Microsoft Office suite (Word, Excel, PowerPoint, Outlook).
- Experience with donor databases or other CRMs.
- Passion for NRGR's mission.

Additional Information:

Occasional evening/weekend work and local travel may be necessary to visit, cultivate, solicit, close, and steward key prospects and attend events.

Proposal Format:

We request the following items in proposal submissions:

1. Cover letter (2-page limit). The cover letter should provide point of contact information for your firm and clearly state any RFP requirements that you will *not* be able to perform.
2. Identify how the proposal came to your attention
3. Proposal. The proposal must address the following areas in a clear and concise manner:
 - a. Overview of your firm
 - i. Capacity to conduct this project
 - ii. Years in business
 - iii. Average time to complete this kind of a search
 - b. Overview of recent, relevant, successful projects, size of nonprofits, sub-sectors they work in, etc.
 - c. Description of your network and experience
 - d. Overview of your process, including specifics on needs assessment
 - e. How your firm values and seeks diversity
 - f. Your terms and conditions
4. Schedule of work - A suggested timeline and methodology of the process with critical milestones for consideration.
5. References from other clients for services of similar scope and complexity. This should



include point of contact information, a description of the services provided, and the outcome.

6. Resumes/bios of the professionals that will work with NRGR and how their time will be allocated
7. Other relevant details that you wish to include that demonstrate your ability to successfully complete the scope of services.

Proposal Evaluation and Selection Process:

- Demonstrated relevant experience in facilitating Planned Giving Programs in the nonprofit sector.
- Past performance.
- Demonstrated ability to meet and exceed the requirements set forth in the Scope of Services, the quality of the proposed product, and the proposed timeline.
- Understanding of NRGR's role as an animal rescue organization and its attendant complexities.
- Price.

NRGR reserves the right to determine which bidders have met the requirements of this RFP. In addition, NRGR may reject, in whole or in part, any and all proposals, waive minor irregularities in proposals, allow a bidder to correct minor irregularities, and negotiate with all responsible efforts in any matter deemed necessary to serve the best interests of NRGR.

NRGR reserves the right to reject any and all proposals when such rejection is in the interests of NRGR, to reject the proposal of a bidder who has not met the prerequisites of the bid proposal or who has previously failed to perform properly or complete on time contracts of a similar nature, and to reject the proposal of a bidder who is not, in the sole opinion of NRGR, able to perform the contract to the sole satisfaction of NRGR.

NRGR also reserves the right to waive any informalities and technicalities in the bidding. NRGR reserves the right, however, to award the contract in accordance with its best interests and will not be required to accept the lowest bid.

Successful Completion of the project may lead to additional work with NRGR.



NEUSE RIVER
GOLDEN RETRIEVER RESCUE

Summary of Key Dates:

Deadline for questions and submission of proposals	May 15, 2022
Notification of selected consultant	June 15, 2022

Submission Details:

If you have questions about the RFP or to submit your completed proposal, please direct them to: nrgrrsproject@gmail.com from **April 20 - May 15, 2022**. **E-mails only, please.**