

REQUEST FOR PROPOSALS

FORUM 2019



Project Overview

Charities Review Council is seeking an experienced event planning extraordinaire to support FORUM 2019. This event will include fun and purposeful networking for cross-sector professionals, a dynamic and innovative keynote speaker, and a panel of local leaders to help attendees reflect and apply learnings locally. With an expectation of 250 - 300 attendees, this event will be a place for donors and nonprofits to build strong, trusting relationships.

Organizational Background/Overview

Founded in 1946, Charities Review Council (the Council) is an independent resource for donors and nonprofits, building donor and nonprofit relationships for strong, vibrant and just communities. By creating the spaces, places, and tools for donor-nonprofit engagement, we are building a culture of philanthropy where donors, funders, and nonprofits are engaged partners, working together for stronger communities.

We help nonprofit leaders build and communicate their organizations' internal strength, so they can achieve their goals. As a result of our collaborative work with nonprofits and grantmakers, we are able to provide donors with smart giving choices, so they can continue to make strong investments with every dollar donated, contributing to healthier communities for all.

Mission & Vision

MISSION: Building donor and nonprofit relationships for strong, vibrant and just communities.

VISION: Transforming philanthropy.

Values

FORGE TRUST: We bring donors and nonprofits together in ways that encourage trust, authentic engagement, and the creation of community centered solutions.

STRIVE FOR EXCELLENCE: We hold ourselves, both as an organization and as individuals, consistently to high standards.

INNOVATE: We listen to our stakeholders to co-create solutions that address evolving needs.

MODEL INTEGRITY: We are honest, transparent, and reliable.

LEAD THE WAY: We challenge ourselves and others to create new relationships, dynamics, and solutions that advance the greater good.

Historical Context

Prior to 2014, Charities Review Council hosted a traditional annual luncheon event, anchored by a keynote speaker. To remain relevant and impactful, we transitioned this event from a networking lunch to a full-day experience. In 2014, we hosted Annual Forum: [*Disruptive Philanthropy*](#). This event experience included a morning design-thinking session, lunch keynote from Michael Faye of

[GiveDirectly](#), and an afternoon live-giving party. It was successful in infusing creativity and innovation into the Council's work, while also engaging cross-sector leaders, some for the very first time.

Using key themes identified during the design thinking session in 2014, Annual Forum 2015 - [Philanthropy 2.0: Radical Collaboration](#) was created. Once again, we hosted a full-day event with three sessions:

- 1) *Making New Connections*, a fun and engaging networking hour, hosted by [SparkIt pop up park](#), which encouraged creative exchange and networking through games, art-making and a festive atmosphere
- 2) *Radical Collaboration in Action*, which included a panel discussion from cross-sector leaders about innovative, disruptive and collaborative projects taking place right here in Minnesota
- 3) *Open Source Brainstorms*, an opportunity for attendees to bring their ideas and possible solutions for collaboration to the table; believing that radical collaboration happens when we expand our networks and bring diverse voices to the discussion

Given the significant human capital required from a very small-staffed organization for an event of this stature, in 2017 we decided to move away from an annual event, to instead host a biennial event, changing the name from "Annual Forum" to "FORUM." We also engaged an event planning partner for the very first time.

[FORUM 2017: Forging Trust](#) was a half-day (morning) experience that included:

- 1) A national keynote from civil rights activist [DeRay Mckesson](#),
- 2) [A panel discussion](#) with local nonprofit and philanthropic leaders, and
- 3) Table discussions that confronted the questions "Who is in power? How is that power representative and inclusive of the population supported by a nonprofit's mission?"

As a part of the FORUM 2017 experience, we launched our Diversity, Equity & Inclusion Toolkit, which includes an affordable, organization-focused assessment tool and learning modules for organizations who wish to build a more effective and reflective organization from the inside out.

As we plan for FORUM 2019, our hope is to create a learning experience that breaks traditional conference norms, with each attendee walking away with at least one tangible takeaway. FORUM 2019 will include fun and purposeful cross-sector networking opportunities for professionals at all levels. It will also bring in a well-known, dynamic and innovative speaker(s), and a panel of local sector leaders. With 250 – 300 expected to attend, we hope to engage a diverse mix of attendees in order to continuing building strong donor-nonprofit relationships.

Project Scope & Deliverables

As the Council's FORUM 2019 event planner, you will support the Council's staff, Program Committee and Board of Directors with planning, coordinating and executing FORUM 2019. Work will begin immediately to ensure a successful event in spring of 2019.

This list is designed to be a starting point and should not be considered exhaustive. It is intended to give a general overview of responsibilities. We are open to further discussing what services you can provide in support of this event.

Responsibilities	Description
Event Program Design	Theme, program design, run of show
Experiential Design	An interactive experience that will foster connections, donor-nonprofit engagement, overall audience engagement, and learning moments for all attendees
Event Logistics & Budget	Manage event budget. Secure vendors: venue, tech support, photographer, videographer, caterer, etc. Attendee registration and management.
Speaker Logistics	Identify potential speakers, coordinate outreach efforts, facilitate negotiation of attendance and stipend, orchestrate pre-event prep, and coordinate day-of logistics
Sponsorship	Creation of sponsorship materials, outreach to secure sponsors, and tracking of benefits
Event Marketing & Sales	Create and help Council staff distribute event invites and marketing collateral (e.g. Eventbrite, social media posts, MailChimp emails, print materials)
Volunteer Coordination	Identify volunteer needs, recruit needed volunteers, host volunteer training (as needed)
Evaluation	Complete post-event event survey and final report with key results/learnings

Budget

We understand that event estimates can vary depending on scale and scope. We look forward to working together to create a scope of work that fits our event needs and objectives. We're committed to talking (~ 30 minutes) before the RFP deadline, if so desired, to provide more information as you consider partnering with us. If interested, please email Abby Wellan at abby@smartgivers.org.

Proposal Requirements

CONSULTANT/FIRM INFORMATION: Provide agency's name, address, URL, and telephone number. Include name, title and e-mail address of the individual who will serve as agency's primary contact. Include a brief description and history of your firm.

PROJECT APPROACH: Please explain your project approach, style and process.

PROVIDE BIOGRAPHIES OF KEY STAFF/CONSULTANTS: Please include a summary of experience of all key staff/consultants.

EXPERIENCE: Proposals should include a list describing projects that are similar in scale that your firm has completed. Where possible, highlight work for analogous organizations.

SCHEDULE AND TIMELINE: Proposals should include the proposed work schedule, timeline, and deliverables. The contract is expected to begin upon signing, with the goal being no later than May 1st, 2018. Project is anticipated to be completed within four weeks after the event date.

COST: Proposals must include the estimated cost for all work related to tasks and deliverables outlined. Ideal proposals will range from \$14,000 - \$16,000, not exceeding \$16,000.

Selection Criteria

- Possesses knowledge/experience of event planning and coordination
- Has an understanding of current and future nonprofit and community trends
- Well-connected to local artists, musicians, speakers, leaders, and so on
- Comfortable with in-person, phone and email communication
- Excellent time-management skills and ability to prioritize projects with competing deadlines
- Comfortable working with diverse populations

Deadline

Please submit your proposal by Friday, March 16th, 2018.

Submit to

Abby Wellan

Charities Review Council

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