



Request for Proposals (RFP)

Fundraising Consultation Service

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Purpose and Objective

Invest in Our Future, a fiscally sponsored project of RF Catalytic Capital, Inc. (the Fund/IOF/we/our/us) solicits proposals for a Chief Fundraising Consultant or firm to support and sustain our replenishment cycle with a goal of raising well over \$100 million in new three-year commitments by the end of 2025.

Overview

RFP Manager: Luke Branscum
RFP Email: lbranscum@investinourfuture.org
RFP Deadline: October 21, 2024 5:00PM EST
Project Start/End Dates: January 1 – June 30, 2025 (anticipated initial contract)

About Invest in Our Future (IOF)

Invest in Our Future (IOF) is marshaling philanthropic resources in a national effort to build an inclusive, equitable clean energy economy.

Under the Biden-Harris administration, the federal government is pursuing a clean industrial strategy that is expected to catalyze \$1 trillion in public and private investments for clean energy manufacturing and deployment across the United States. These investments offer a unique opportunity to create high-quality, well-paying jobs for local residents, raise local tax bases, broaden access to clean energy for families and businesses, reduce air and water pollution, and build resilience against extreme weather, all at once.

IOF launched as a pooled philanthropic fund to help communities across the country tap into this opportunity—by raising awareness of new programs and incentives, building capacity at the state and local level, accelerating new projects through complex approval processes, expanding America’s skilled clean energy workforce, and amplifying success stories.

The fund's grantmaking focuses on place-based strategies to build enduring ecosystems of support that will facilitate the long-term work of effective, equitable implementation nationwide, while prioritizing historically underserved communities. Grantees represent a wide range of backgrounds, including climate and environment, health, justice, education, agriculture, labor, faith, and more. These experienced partners bring to their work a clear understanding of their communities’ needs, a strong grasp on the process for unlocking funding, and a deep focus on high-potential, locally-led initiatives.

At the same time, IOF also serves as a strategic hub for NGOs and grant makers working in the emerging space of climate and clean energy implementation. Leveraging connections to a broad funder network, IOF coordinates across philanthropy to identify gaps and direct funding to on-the-ground organizations that can fill those gaps.

Fiscal Sponsor: RF Catalytic Capital

Invest in Our Future is a fiscally sponsored project of RF Catalytic Capital, Inc. (“RFCC”). RFCC is a new 501(c)(3) public charity, launched by the Rockefeller Foundation in 2020, whose work is to develop, support, and/or apply innovative solutions to address the world's most intractable social and environmental problems impacting vulnerable people and communities.

Scope of Work

IOF seeks a Chief Fundraising Consultant or firm to support and sustain our mission. The organization is currently funded through mid-2026 through a series of multi-year grants. IOF is discussing a new round of grants with our current philanthropic partners through 2030 and is aiming to expand the set of philanthropic partners in IOF's pooled fund. Our fundraising goal over this period is to bring in well over \$100 million in new commitments.

IOF's Chief Fundraising Consultant or firm will:

- Collate information from a broad set of IOF stakeholders including the management committee, executive leadership team, IOF funder network, and grantees to inform and develop an outreach, stakeholder engagement, and fundraising plan for IOF for 2026-2030
- Facilitate a replenishment campaign for seeking new funding rounds for existing donors
- Identify prospective donors and lead fundraising from new funders including the writing, preparation, and submission of letters of inquiry, proposals, and high-quality, creative, engaging cases for support, incorporating relevant research
- Develop a stakeholder map and support IOF's senior leaders with donor background research and outreach
- Identify, establish and track fundraising targets, objectives and milestones as part of an ongoing engagement campaign for IOF throughout the duration of the contract and via Salesforce
- Develop materials for and staff Executive Director in key stakeholder outreach meetings, bilateral meetings, funder network meetings, and events, including one-two pagers, impact stories, and bespoke PowerPoint presentations that communicate the value-add of Invest in Our Future
- Manage and track all donor information and develop stewardship program

Qualifications for IOF's chief fundraising consultant or firm:

- Established track record for raising multi-year commitments of at least \$10,000,000 from institutions and high net-worth individuals with a relationship based, long-term mindset
- Experience researching and leading on fundraising campaigns with collaborative funds, NGOs, and/or blended finance structures incorporating the philanthropic sector
- Knowledge of and connections with major climate and environmental funders and/or funders who support community and economic development preferred
- Understanding of the national climate finance landscape and IRA legislation preferred
- Excellent communication skills, both written and oral; ability to think outside the box and deploy creative plans and solutions

The RFP Process

In furtherance of its core commitment of Expanding Equity and Economic Opportunities, IOF actively seeks partnerships with a diverse set of suppliers of goods and services. This includes, but is not limited to, minority-owned businesses (MBEs) and women-owned businesses (WBEs), as well as veteran-owned, service-disabled veteran owned, and LGBTQ-owned businesses. This also may include socially and environmentally aware businesses, and businesses that make diversity, equity, and inclusion important components of their business models.

Accordingly, IOF seeks input from potential suppliers about their business ownership and their commitment to diversity, equity and inclusion. The information provided will assist IOF in choosing suppliers who maintain practices that align with IOF's diversity, equity, and inclusion policies and, at the same time, are best positioned to provide high quality, competitively priced goods and services.

IOF has in recent years invested time and resources to review our culture, particularly around sustainability, diversity, equity, and inclusion. During the RFP process we may seek to gather information about our potential vendors related to our values to better understand those we work with and their commitments.

Sustainability

IOF is committed to procuring sustainable, ethical and responsibly sourced materials, goods and services. We seek to partner with suppliers who maintain practices that align with these values and practices and, at the same time, are best positioned to provide high quality, competitively priced goods and services.

Accessibility

IOF is committed to ensuring that our RFP process is accessible, and we may be able to offer some adjustments to enable interested vendors to better participate in the process. For support during the RFP process, contact the listed RFP Manager.

Key RFP Activity Dates

Key Activity	Target Date*
Issue RFP	October 31, 2024
Intent to Bid and/or Vendor Questions due to RFP Manager via email at lbranscum@investinourfuture.org	November 8, 2024 by 5:00pm EST
Response to Vendor Questions	November 12, 2024 by 5:00pm EST
Proposals due to RFP Manager via email at lbranscum@investinourfuture.org	November 15, 2024 by 5:00pm EST <i>Please inquire regarding late submissions.</i>
Evaluation of Proposals	November 15-December 6, 2024
Selection of finalists and proposal presentations, if needed	December 9-13, 2024
Selection Announcement	No later than December 31, 2024

*dates are subject to change, vendors will be notified of any changes

The Proposal

All proposals must include the following:

1. Cover Letter
Summary of Company Background, key project personal, cost and expectations, etc.
2. Company Background
Please provide a brief description of your company including its office size, history, resources, types of services customarily provided, location(s) and portfolio size.
3. Attributes and Approach
A narrative that addresses how the Scope of Work, as outlined above, will be accomplished, including a timeline with benchmarks and the number of hours required to accomplish the work (hours per week and how flexible your availability is).
4. Experience
Experience and qualifications of the consultant and include the resume of the principal individual providing direct service for this work.
5. Pricing Overview
Project budget inclusive of fees and reimbursable expenses payable by IOF must be clearly defined.
6. Subcontracting
The proposal and budget must identify any subcontracted services and identify the subcontractor by name.
7. Vendor References
Please provide a minimum of three references from projects with similar scopes and budgets.
8. Other Information
Please provide any additional information that you think supports your firm's credentials and qualifications.

All proposals should be submitted electronically in PDF form to Luke Branscum, Director of Strategic Initiatives and Operations, at lbranscum@investinourfuture.org.

Terms and Conditions

Reservation of Rights

IOF reserves the right to reject any or all proposals submitted if it is deemed to be in the best interest of IOF.

All proposals and supporting documentation shall become the property of IOF, subject to claims of confidentiality in respect of the proposal and supporting documentation.

IOF reserves the right to check the accuracy of all information and to request official supporting documents. Applicants who provide inaccurate information can always be excluded from the RFP process.

Confidentiality

IOF reserves the right to require any respondent to enter into a non-disclosure agreement.

Costs and Ownership

The RFP does not obligate IOF to pay for any costs of any kind that may be incurred by the applicant or any third parties, in connection with your response. All responses and supporting documentation shall become the property of IOF, subject to claims of confidentiality and copyright, in respect of the response and supporting documentation.

Intellectual Property

Applicants should not use any intellectual property of IOF, RFCC and The Rockefeller Foundation including, but not limited to, all logos, registered trademarks, or trade names of IOF, at any time without the prior written approval of IOF, as appropriate.

Responses

All accepted responses shall become the property of IOF and will not be returned.

Governing Law

This RFP and your response to it shall be governed by the laws of the State of New York.

No Liability

IOF shall not be liable to any respondent, person, or entity for any losses, expenses, costs, claims, or damages of any kind:

- Arising out of, by reason of, or attributable to, prospective vendors responding to this RFP; or
- As a result of the use of any information, error, or omission contained in this RFP document or provided during the RFP process.

IOF assumes no obligation, no responsibility and no liability for costs incurred by vendors responding to this RFP prior to the issuance of a contract.

Privacy

Personal information collected from any respondent is subject to the following privacy policy, available at <https://www.rockefellerfoundation.org/privacy-policy/> and will be used by IOF in accordance with this



privacy policy. For international respondents, please be aware that the information submitted is collected in the United States of America. In addition to being subject to the privacy policy, the collection, storage, and use of a respondent's personal data will be subject to U.S. laws and regulations, which may be different from the laws and regulations of other countries. By participating in this RFP, the respondent consents to this collection, storage, and use.

Entire RFP

This RFP, any addenda to it, and any attached schedules, constitute the entire RFP. If it becomes necessary to revise any part of this RFP, IOF will contact all participants.