



The Denver Foundation

## **Request for Proposals for Audience Research May 2022**

### **About The Denver Foundation**

The Denver Foundation is a community foundation that inspires people and mobilizes resources to improve life in Metro Denver. Since 1925, The Denver Foundation has helped generous people be catalysts for good by building charitable legacies. As the largest and most experienced community foundation in the Rocky Mountain region, we help people give back to Metro Denver in ways that are meaningful to them and impactful to the community. The Denver Foundation has three roles: stewarding a permanent endowment to meet current and future needs for Metro Denver; listening and working with community leaders to address the core challenges that face the community, with an emphasis on racial equity; and managing more than 1,000 charitable funds on behalf of individuals, families, and businesses. To learn more about The Denver Foundation, visit [www.denverfoundation.org](http://www.denverfoundation.org).

### **Organization background and structure**

In November 1925, community leaders came together to create an endowment to serve the future needs of Metro Denver. Today, The Denver Foundation manages assets of more than \$1.3 billion. Last year, the Foundation secured over \$300 million, primarily through donor-advised funds, and awarded \$115 million to worthy organizations in Colorado and nationally.

The core work of the foundation is guided by the [Strategic Framework](#), a fluid document adopted in February 2021 affirming The Denver Foundation's commitment to centering racial equity and prioritizing community leadership, inside and outside of the organization. This framework is designed to be a guiding light over the next decade and is reflected in these major priority areas:

- Education
- Housing
- Transportation
- Environment and Climate
- Economic Opportunity
- Policy and Civic Fabric

These priorities are reflected in the foundation's many programs, scholarships, and funds which make a positive impact in Metro Denver. Grantmaking programs such as Strengthening Neighborhoods, which is celebrating its 25<sup>th</sup> anniversary this year, provide modest grants to community-led projects. The Community Grants Program awards more than \$4 million annually to nonprofits focused on the foundation's priority areas. Other grantmaking programs include the Critical Needs Fund and Technical Assistance.

The Denver Foundation also administers a wide range of scholarships with assets of \$69 million. In 2021, the foundation awarded 1,210 scholarships totaling \$5 million, including the Reisher Scholarship, one of Colorado's largest scholarship programs.

Finally, the foundation cultivates, solicits, and stewards more than 1,000 charitable funds, including donor-advised funds, designated funds, field of interest funds, scholarships, and impact investing opportunities through program-related investments. In addition, staff identifies and stewards planned and blended-gift donors.



The foundation employs more than 50 staff members led by President and CEO Javier Alberto Soto, who joined the organization in 2019 from The Miami Foundation. Over the past two years, The Denver Foundation has welcomed more than 20 new staff members who bring a range of lived experiences and philanthropic expertise. Volunteer leadership makes up an important constituency and includes a 20-member Board of Trustees and other non-board volunteer committees, including the Professional Advisors Council, Impact Investing Committee, and Advisory Committee for Community Impact.

The organization includes four departments, including

- Communications – responsible for external communications, including marketing.
- Finance and Administration – responsible for accounting and financial management.
- Impact – a newly merged department responsible for both grantmaking, fund administration, fundraising, and cultivating new philanthropic relationships.
- Operations – responsible for facilities and information technology.

**Mission:** We inspire people and mobilize resources to strengthen our community

**Vision:** A Metro Denver that is racially equitable in its leadership, prosperity and culture.

**Our purpose:** To achieve our vision, we will be a proactive, collaborative, and resolute leader in reducing racial disparities.

#### **Our values**

- We are deeply rooted in the principles of Equity, Inclusion, and Diversity, and racial equity guides and connects all of our work.
- We are a catalytic leader that engages critical issues and accelerates systems change.
- We maintain trusting, collaborative relationships with our partners, people from every segment of our community.
- We strengthen our civic fabric by elevating the voices and perspectives of community members.

#### **Audiences**

- **Fundholders and donors (including potential donors).**
- **Non-profit organizations and grantees.**
- **Professional advisors**, including financial advisors, CPAs, and estate attorneys.
- **Community leaders**, including business owners and policymakers.

#### **Current situation**

As we approach our 100<sup>th</sup> anniversary, the foundation is considering embarking on its first major fundraising and awareness-building campaign to celebrate this milestone. Our hope is the 100<sup>th</sup> Anniversary Campaign will engage new community leaders and secure resources to prioritize racial equity and address the needs of our community and region today, tomorrow, and long into the future.

In order to help us articulate our identity to support a campaign, it's essential that we have a clear understanding of our audience's perceptions of us, both positive and negative. From this work we want to understand our stakeholders' perceptions of the foundation; how best to engage our stakeholders, including BIPOC-led, and BIPOC-serving stakeholders and organizations, in this campaign; and the best messaging and brand adjustments required to meet our ambitious 100th anniversary goals.



In this process, we hope to better understand our competitive position in the market, brand awareness and identity, messaging, and, ultimately, how we should approach our 100th anniversary.

### Existing Documents

We will share these with the selected vendor.

- 2022 Center for Effective Philanthropy Donor Survey Report
- 2016 and 2022 Brand Guidelines
- 2021 Communications Plan
- Data from recent reports including, results from our applicant/grantee survey, feedback from learning conversations/focus groups, feedback from our panel/committee volunteers, etc.

### Required deliverables

- **Report to include:**
  - **Key findings** from audience research, including brand awareness and perceptions among all our audiences
  - **Competitive analysis** following a market scan to collect current attributes and benefits of our competitors.
  - **High-level recommendations for how to make the case for support** for our 100th anniversary campaign
  - **Messaging** for each audience, including brand voice and tone, brand positioning, elevator speech (for the organization), elevator speech (for the 100th anniversary), boilerplate
  - **Recommendations for brand look and feel next steps**
- **Presentation and message training**
  - Presentation and message training to staff
  - Presentation and message training to the Board of Directors
- **Visual identity** (only if suggested by the audience research. Please provide a separate budget.)
  - Logo (potentially just a 100th Anniversary logo) in various formats for multiple applications
  - Tagline (optional)
  - Colors (primary and secondary)
  - Typography
  - Visual elements, including illustration/ photography/ graphics
  - Assets (including letterhead, envelopes, business cards, presentation, email, assets)

### Proposal requirements (no more than 10 pages)

- **Name and background** – include the complete name and contact information. If any of the work is subcontracted to another party, please provide the same information for all firms, and indicate who will be the lead firm.
- **Profile of firm** – provide a brief description of the size of the firm(s) and the composition and qualifications of professional staff by level. Include your firm's racial/ethnic and gender demographics and leadership.



- **List of personnel** – provide information on who will work on this project, including their education, experience, and qualifications.
- **Diversity Statement** – The Denver Foundation is deeply rooted in the principles of equity, inclusion, and diversity, and racial equity guides and connects all of our work. Describe your firm’s efforts to recruit, retain, promote, and support people from various racial and ethnic backgrounds. Describe:
  - Your firm’s commitment to racial equity and justice
  - How your firm has showcased a commitment to diversity regarding clients, pro bono work, and hiring practices
  - How your firm has demonstrated a commitment to support causes of equity and justice for different groups
- **Proposed approach** – explain your approach, including work plan and timeline, describing how you will implement the design and development process for this project.
- **Line-item budget** – provide a budget for the stages of development in which you will provide the work described in this RFP. Indicate an hourly rate (if applicable) for subsequent work that may be required or deemed necessary. (Please include a separate line item for visual identity if it's ultimately recommended as a result of the audience research.)
- **Portfolio** – showcasing your current work with an emphasis on research and branding.
- **References** – offer at least three references from clients who have used your services for similar work. Briefly describe the scope of your work for these references, the year completed, and a contact name and telephone/email for each one.
- **Information on additional services (optional)** – please provide any information on additional services that you believe would be pertinent, and align with our mission, vision, and values.

**Budget:** Please provide an estimated budget for the deliverables listed above.

### **Schedule and timeline**

Proposals should include the proposed work schedule, timeline, and deliverables.

The contract is expected to begin August 1, 2022, and should ideally be completed by January 15, 2022.

### **SELECTION CRITERIA**

We will evaluate proposals based on the following criteria:

- Demonstrated knowledge, skills, and experience in branding design for foundations or nonprofits
- Commitment to diversity, equity and inclusion
- Appropriateness of fee structures and pricing model

### **Project lead**

Please contact Abigail Kesner by May 23, 2022, with any questions you may have regarding the foundation or RFP. We will answer all questions received by the deadlines listed below.

*Abigail Kesner*

*Vice President of Communications*

303-300-1790, [akesner@denverfoundation.org](mailto:akesner@denverfoundation.org)



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## Schedule

The Denver Foundation would like to conclude this work by January 15, 2023.

The preliminary schedule is as follows:

Request for Proposals (RFP) live	May 16, 2022
Deadline to submit questions	May 27, 2022
Q&A responses posted to our website	June 3, 2022
Proposal due	June 24, 2022
Interviews conducted with finalists (if necessary)	Week of July 11, 2022
Announcement	July 22, 2022
Contract begins	August 1, 2022
Work complete	January 15, 2023

Submit proposals electronically as a PDF to [akesner@denverfoundation.org](mailto:akesner@denverfoundation.org).

Please use the subject: "Audience Research Proposal, (Consultant/Firm Name)."