



### Request for Proposals for Audience Research- Q&A

**1. Q: What is your budget range?**

A: We are looking for proposals around \$40-\$60,000.

**2. Q: We know that through the communications partnership, you hope to understand stakeholders' perceptions of the foundation; how best to engage stakeholders, and the best messaging and brand adjustments required to meet your 100th anniversary goals. Could you share more about what these goals are?**

A: We are in the process of articulating our 100th-anniversary goals. This research will help us define those goals. We anticipate that there will be a component to this work that will raise the profile of the foundation in the community. We also expect to have some fundraising and grantmaking components to the celebrations, but we will define the specific tactics based on this research. It is important that our activities meet the needs identified by our stakeholders.

**3. Q: We also noted that you hope to engage new community leaders through this work. Are there specific issue areas – such as Denver metro priorities like gentrification and displacement; harm reduction; child care; and affordable housing – that you'd like to expand upon as you prioritize racial equity?**

A: The issue areas important to our organization are detailed in our [strategic framework](#). They include civic fabric, climate and environment, economic opportunity, K-12 education, housing, and transportation. You can find more information on page 18 of our [strategic framework](#).

**4. Q: Is there any consideration for follow-on projects after the project concludes in January 2023?**

A: Yes. Depending on the research results, we may be interested in additional projects to support the communications around the 100th anniversary, which could include branding work, communications planning, or other activities. We may also decide not to work with a vendor on follow-up projects.

**5. Q: How many agencies do you expect will respond to this RFP?**

A: We anticipate approximately 10 applications, based on the questions we have received.

**6. Q: Is there an incumbent agency you have worked with on projects like this one in the past?**

A: There is no incumbent agency.

**7. Q: Under Required Deliverables, Report to include – you say, “key finding from audience research” – do you already have the research complete and need the consultant to summarize the existing research your team will provide OR do you intend to have the partner in this project conduct new, original research that uncovers brand awareness and perceptions among audiences? If the latter, would you provide contacts/emails and target organizations for stakeholder outreach? How many contacts will you provide?**

A: Both. We have recent research that will be available and relevant (e.g., results of our fundholder survey and grantee/applicant survey). We will also look to the selected consultant to facilitate original research building on the few brand awareness questions we have. We do not want to over-survey our stakeholders, so expect the consultant to work closely with our team to determine what makes sense and what areas of alignment may exist with currently planned data collection efforts. We are able to provide contacts/emails



for the audience groups listed in the RFP that are currently connected to The Denver Foundation. However, if the consultant recommends reaching outside of our current connections, we will rely on the consultant to determine the best methods for reaching those groups and individuals. Our database is extensive with more than 26,000 donor contacts (past and present), 13,000 grantee contacts (past and present), and 3,000 professional advisors. We would look to the consultant to make recommendations about what parameters to set with narrowing any outreach efforts-- the contact lists provided will depend on the research method and goals selected.

**8. Q: How many competitors would you want reviewed as part of a competitive analysis?**

A: We anticipate approximately five organizations as part of the competitive analysis: Rose Community Foundation, Community First Foundation, Fidelity Charitable, Schwab Charitable, Vanguard Charitable.

**9. Q: Under “presentation and message training to staff” – can we assuming this is one training for all your staff?**

A: We would like one training for staff and one training for our board.

**10. Q: Will The Denver Foundation recruit audience/stakeholders for user research participation, or will recruitment be the responsibility of the selected firm?**

A: If the proposed work aligns with already planned stakeholder outreach (e.g., questions can be embedded into the existing grantee/applicant survey), The Denver Foundation will recruit. However, if the proposed methods are original, we would expect the selected firm to recruit with support from The Denver Foundation (e.g., we can provide contact information, send templated emails, etc.)

**11. Q: Is there a preference for a Denver- or Colorado-based firm?**

A: No.

**12. Q: What are your top marketing and communication challenges?**

A: We have very strong marketing and communications efforts at the foundation. We hope through this work, we can dig deeper into data and determine opportunities to do our work better. We hope this research will give us a better understanding for our audiences, so we can engage them with the best messages and tactics to help us reach our strategic goals.

**13. Q: What marketing strategies have you tried before? Were they successful?**

A: The Denver Foundation implements a full range of marketing strategies. We updated our website in 2019 to simplify the navigation and ensure our audiences were able to find our information more easily. We have segmented e-mail marketing campaigns with high open rates (43% average, with some as high as 80%) and strong click-through rates. We are in the process of building up our social media strategy and will reinstate our paid efforts later this year.

**14. Q: Who do you identify as your primary competitors?**

A: Rose Community Foundation, Community First Foundation, Fidelity Charitable, Schwab Charitable, Vanguard Charitable.

**15. Q: What does success look like? Have you identified any success metrics or KPIs?**



A: For this project, success looks like a clear understanding of how we are perceived among our stakeholders so we can better communicate with them and work with them to strengthen our community. From this research we will define our strategy for 100th anniversary and articulate the KPIs for that work.

**16. Q: Will the chosen vendor be involved in developing a fundraising and/or awareness building campaign, based on the research, or do you expect that the resulting implementation work will be done by the Denver Foundation team?**

A: We don't know yet. Depending on the research results, we may be interested in additional support around the 100th anniversary, which could include branding work, communications planning, or other activities. We may also decide not to work with a vendor on follow-up projects.

**17. Q: Do you have an in-house marketing team? What are their roles?**

A: We do. We have a new senior communications officer who will lead our marketing efforts and set the strategy in partnership with the vice president of communications. We have a communications director who is in charge of our content creation, including storytelling to support our marketing efforts. We have a new communications coordinator to support our communications team, including our marketing efforts. We also have a communications specialist who oversees our events.

**18. Q: How many vendors have submitted questions in response to this RFP?**

A: Ten.

**19. Q: The RFP states that the proposal is due June 24, 2022. Can you please confirm the required submission time.**

A: The deadline to submit the proposal is 5 pm MST on June 24, 2022.

**20. Q: Will proposals be evaluated digitally, or will they be printed for evaluation?**

A: The proposals will be offered to the evaluation team electronically. The evaluators may choose to print.

**21. Q: Is it acceptable to share documents and attachments using Google?**

A: Yes.

**22. Q: Is there someone who could be considered an incumbent on this project? Is there another company that you've worked with before, or any other company that would receive preference for winning this project?**

A: No. There is no one considered an incumbent.

**23. Q: It's important to us to know that the work we do is improving the lives of others. How many lives will be improved as a result of our relationship? Even a rough ballpark estimate would help.**

A: As you can see from all of our materials, The Denver Foundation is focused on strengthening our community. We do not quantify our work in this way.

**24. Q: Once the project has started, what will the makeup of the decision-making committee be like? Will decisions be made by a large group, a small committee, or a single person?**



A: The decisions will be made by a small committee of five. There will be one point of contact on the project from The Denver Foundation who will ensure the team meets deadlines and consolidate feedback so it is clear.

**25. Q: What project management process will work best for this project: waterfall, agile, a hybrid of those, or something different?**

A: We do not have a preferred project management process. We welcome working with the project management process that fits best for the selected vendor.

**26. Q: Is there anything about your organization that might make this project difficult?**

A: We do not want to over-survey our stakeholders. We expect the consultant to work closely with our team to determine what makes sense and what areas of alignment may exist with currently planned data collection efforts.

**27. Q: Have you worked with an agency before? If so, tell me about that experience?**

A: We've worked with several agencies in the past and have had great experiences. We've worked with agencies and consultants to support a website redesign, social media strategy, and messaging. We appreciate partners who communicate clearly, keep us on track, and understand our business model and mission.

**28. Q: What's important to you about the partner you choose?**

A: We appreciate partners who communicate clearly, keep us on track, and understand our business model and mission.

**29. Q: How should this project be billed? Fixed-bid deliverables based, hourly, monthly retainer, or something else?**

A: The selected vendor can bill this project on a fixed-bid or deliverables-based. For the budget included in the proposal, please follow the instructions listed in the RFP.

**30. Q: When does your organization's fiscal year start?**

A: January 1. Our fiscal year follows the calendar year.

**31. Q: Can you share a budget range you have available for audience research?**

A: We are looking for proposals around \$40-\$60,000.

**32. Q: Can you share a budget range for the visual rebrand?**

A: We do not have a budget range for this yet. Please provide an itemized budget so we can assess the cost of potential components.

**33. Q: What—if any—existing research do you have that we would be able to review prior to conducting our research?**

A: We have recent research that will be available and relevant (e.g., results of our fundholder survey, grantee/applicant survey).



**34. Q. Do you have lists of existing donors, organizations, community leaders, and other key audiences or are you hoping the vendor will have or find these panels?**

A: We are able to provide contacts/emails for the audience groups listed in the RFP that are currently connected to The Denver Foundation. Our database is extensive with more than 26,000 donor contacts (past and present), 13,000 grantee contacts (past and present), and 3,000 professional advisors. We would look to the consultant to make recommendations about what parameters to set with narrowing any outreach efforts-- the contact lists provided will depend on the research method and goals selected.

**35. Q. Who do you see as your comparators in this space (for inclusion in the landscape analysis)?**

A: Rose Community Foundation, Community First Foundation, Fidelity Charitable, Schwab Charitable, Vanguard Charitable.

**36. Q: Do you have expectations around whether this research will be qualitative, quantitative, or mixed method?**

A: We do not have expectations. We are interested to see what the vendor would recommend.

**37. Q. What challenges do you expect (externally and internally) to face if the research indicates visual brand updates may be required?**

A: The biggest challenge is the cost of a rebrand, including updating the digital presence, existing print collateral, and building signage.

**38. Q: Can you give us a sense of the Foundation's openness to rebranding the larger organization if indicated by audience research?**

A: We are open to rebranding if indicated by audience research.

**39. Q: When was the last time you rebranded? Who created the current branding?**

A: We rebranded in 2016 and updated the brand guidelines slightly in 2019. We worked with Pyramid Communications on that project.

**40. Q: Is this bid open to any respondent, or have you only sent it to a pre-qualified list? How many responses are you expecting? Have you worked with any of the bidders previously?**

A: This bid is open to any respondent. We anticipate approximately 10 applications, based on the questions we have received. We do not know who will be bidding, so we do not know if they represent firms we have worked with previously.

**41. Q: Have you recently or are you currently working with other vendors to conduct audience research, or to support your digital branding or campaigns, and if so are they eligible to bid on this project?**

A: We are working with a research vendor on our donor survey that we conduct every four years. We are working with a different vendor to create our social media content. All vendors are eligible to bid on this project.

**42. Q: Is there a preference to work with a local firm?**

A: No.



- 43. Q: Can you provide more details on how the evaluators will weigh the three presented evaluation criteria (relevant experience, commitment to DEI, and appropriateness of pricing) relative to one another?**

A: Racial equity is core to our strategic mission, vision and purpose and thus will be considered more fundamental relative to other areas.

- 44. Q. In order to include all of the requested information at a sufficient level of detail, would the Foundation allow the Portfolio, References, Personnel information, and/or information on Additional Services to be included as an Appendix, outside the 10-page limit?**

A: The following content must fit into the 10-page limit: Name and background, Profile of firm, List of personnel, Diversity Statement, Proposed approach, and Line-item budget. The following information may be included in an Appendix in excess of the 10-page limit: Portfolio, References, Information on additional services (optional).

- 45. Q: As the Foundation is requesting a separate budget for visual identity design, may our approach and budget for that scope of work also be presented outside the 10-page limit?**

A: The approach and budget for visual identity can be presented outside the 10-page limit, since it is not the core of the RFP and may not be a project that the foundation pursues, depending on the research results.

- 46. Q: Is the research report to be based on only the existing research you will provide, or should we plan and budget for additional audience research? If so, what key audiences do you still need to hear from to inform this work?**

A: Both. We have recent research that will be available and relevant (e.g., results of our fundholder survey, grantee/applicant survey). We will also look to the selected consultant to facilitate original research building on the few brand awareness questions we have. We do not want to over-survey our stakeholders, so expect the consultant to work closely with our team to determine what makes sense and what areas of alignment may exist with currently planned data collection efforts. We are able to provide contacts/emails for the audience groups listed in the RFP that are currently connected to The Denver Foundation. However, if the consultant recommends reaching outside of our current connections, we will rely on the consultant to determine the best methods for reaching those groups and individuals. Our database is extensive with more than 26,000 donor contacts (past and present), 13,000 grantee contacts (past and present), and 3,000 professional advisors. We would look to the consultant to make recommendations about what parameters to set with narrowing any outreach efforts-- the contact lists provided will depend on the research method and goals selected.

- 47. Q: Do you have general budget parameters that should guide our response?**

A: We are looking for proposals around \$40-\$60,000.

- 48. Q: Out of the four main audience groups defined in the RFP, what is the total size of TDF current audience groups to be sourced in the scope of work (i.e how many fundholders, donors, nonprofit organizations, grantees, advisors and community leaders)?**

A: Our database is extensive with more than 26,000 donor contacts (past and present), 13,000 grantee contacts (past and present), and 3,000 professional advisors.



**49. Q: What type of TDF demographic data and/or personas on each of the target audiences will be available for consultants working on this scope work?**

A: We know role (e.g. donor, grantee etc.) and the connection to The Denver Foundation for individuals in our database. Outside of that, we do not consistently collect much demographic information. With donors, we often have gender and age. With grantee contacts, we may have gender. So we can help create lists for the selected vendor based on role or connection to The Denver Foundation. We would rely on the vendor's methods to ensure we had a representative sample.

**50. Q: Does TDF have a current database of financial advisors, CPAs, estate attorneys, business owners, influencers and policymakers that are specifically BIPOC or will you look to the consultants to identify and engage these individuals?**

A: Our database is extensive with more 3,000 professional advisors, including financial advisors, CPAs, estate attorneys. Our policymaker/ influencer list is growing, but much smaller. We will look for the vendor to identify and build on additional individuals or organizations to connect, including influencers and policymakers.

**51. Q: Is TDF receptive to focus groups, surveys or other additional outreach/feedback activities as part of the scope of work?**

A: Yes. We do not have expectations. We are interested to see what the vendor would recommend.

**52. Q: With the RFP referencing a 2022 brand standards guide available for the hired consultants to review, has the main organizational identity recently been updated?**

A: We will share our current brand guidelines with the selected vendor. We developed these brand guidelines in 2016 and updated them in 2019 and again in 2022.

**53. Q: How many competitors do you anticipate including in the market and competitive analysis?**

A: Five: Rose Community Foundation, Community First Foundation, Fidelity Charitable, Schwab Charitable, Vanguard Charitable.

**54. Q: The RFP is 10 pages does this include the front and back cover or just content pages responding to specifics in the RFP?**

A: The following content must fit into the 10-page limit: Name and background, Profile of firm, List of personnel, Diversity Statement, Proposed approach, and Line-item budget. The following information may be included in an Appendix in excess of the 10-page limit: Portfolio, References, Information on additional services (optional).

**55. Q: What is your budget for the scope of work, excluding the requested separate design budget?**

A: We are looking for proposals around \$40-\$60,000.

**56. Q: For the portfolio page of the response, would TDF like to see full examples on the one page or would TDF be amenable to reviewing further examples/details housed online via a link?**

A: We will accept both, but it is the vendor's responsibility to ensure the links are functional.



**57. Q: Beyond processes and deliverables, what are the ideal characteristics that The Denver Foundation is seeking in a partner? When TDF has worked with creative partners in the past, were there any traits that TDF is seeking to replicate and/or avoid?**

A: We appreciate agencies who communicate clearly, keep us on track, and understand our business model and mission. We also are looking for a partner with a commitment to racial equity.

**58. Q: What does TDF see as the biggest challenge this project will face?**

A: We do not want to over-survey our stakeholders. We expect the consultant to work closely with our team to determine what makes sense and what areas of alignment may exist with currently planned data collection efforts.

**59. Q: Do you have any further information or detail you can provide around your audience segments and your goals in reaching them?**

A: We will provide that information to the selected vendor.

**60. Q: Do you feel you have consistent challenges reaching or engaging any particular audience groups? Can you describe the language considerations of your audiences?**

A: We're still learning about challenges reaching or engaging any particular audience groups. We would expect the vendor to conduct research in English and Spanish, which is reflective of the demographics of our community and our audiences.

**61. Q: We see in the RFP that you have welcomed a significant number of new staff in the last two years. How do you see this impacting the project? Are newer staff with lived experience leading the work? What is the role of legacy staff members?**

A: We have a mix of tenures of qualified staff leading the project. The selected vendor will have an opportunity to work closely with the project team and identify what would be helpful to make this project successful.

**62. Q: How many people would be part of the TDF working team? What are their roles and levels of experience being involved in projects like this?**

A: We have a mix of tenures of qualified staff leading the project. There will be about five staff working closely on this project. Staff work on our impact, data and evaluation, and communications teams. They individually have a decade or more of experience working on similar projects.

**63. Q: Can you provide insight into the review process for the key deliverables throughout the project? How many stakeholders do you expect to be involved? Will other partners or stakeholders be involved in approvals?**

A: The decisions will be made by a small committee of five. There will be one point of contact on the project from The Denver Foundation who will ensure the team meets deadlines and consolidate feedback so it is clear.

**64. Q: Will TDF help connect us with potential audience members, or will the selected vendor need to recruit people?**

A: If the proposed work aligns with already planned stakeholder outreach (e.g., questions can be embedded into the existing grantee/applicant survey), The Denver Foundation will recruit. However, if the proposed



methods are original, we would expect the selected firm to recruit with support from The Denver Foundation (e.g., we can provide contact information, send templated emails, etc.)

**65. Q: Do you have current KPIs or measurement tools that you're using to monitor brand awareness and attitudes toward your organization?**

A: We are working with a research vendor on our donor survey that we conduct every four years. This includes a question on brand awareness and several questions on perceptions/ attitudes. We also have a recent grantee/applicant survey. We just closed the first round and the second round will be administered in October. This also includes questions on perceptions/ attitudes. This project is an opportunity to set a baseline and define KPIs for the future.

**66. Q: Can you send us a few links to your main peers/competition for us to review?**

A: Our main peers are Rose Community Foundation, Community First Foundation, Fidelity Charitable, Schwab Charitable, Vanguard Charitable.

**67. Q: How are you communicating with your community today? Email? Social Networks?**

A: We have a comprehensive paid, earned, and owned media strategy. We have a bilingual website, social media presence, and segmented email marketing strategy. We also host events for our various stakeholders.

**68. Q: The RFP notes that there are a set of 2016 and 2022 brand guidelines. Was that the last time your team re-evaluated your brand? What were the main challenges, takeaways, or outcomes from the last time your team updated your brand?**

A: Yes. We will share takeaways from that work with any vendor if we decide to go through a rebrand as a result of this audience research. We may not rebrand as a result of this work.

**69. Q: Are you able to share other marketing collateral and materials that you've developed to reach these audiences to help provide a fuller picture of how the brand currently translates across channels?**

A: All of our marketing collateral is available on our website.

**70. Q: Have you run any marketing campaigns recently (in the last three years) that were particularly successful in reaching or engaging your core audiences?**

A: We've run several marketing efforts recently that have been successful in bringing in new business, including inserts of one of our publications in local papers (50,000 copies to high net worth households), underwriting campaigns, and mailings to existing fundholders. We also send a quarterly newsletter to our professional advisors.

**71. Q: Are other major product or marketing launches currently planned during the project timeline?**

A: We typically run an end-of-year fundraising campaign in November/ December.

**72. Q: How does your team plan to measure the success of the project?**

A: For this project, success looks like a clear understanding of how we are perceived among our stakeholders so we can better communicate with them and work with them to strengthen our community. From this research we will define our strategy for 100th anniversary and articulate the KPIs for that work specifically and for our marketing efforts moving forward..



**73. Q: Are you looking for a firm that has extensive experience working the Metro Denver region? And existing relationships or connections with individuals or organization within each of the 4 Audience segments within the Metro Denver?**

A: We have no preference for a Denver- or Colorado-based firm.

**74. Q: Amongst the 4 audience segments, which are considered primary vs. secondary audiences? Any high-level breakdown estimates on how many people or organizations within each segment?**

A: All four audience are considered primary for the purposes of this project. Our database is extensive with more than 26,000 donor contacts (past and present), 13,000 grantee contacts (past and present), and 3,000 professional advisors.

**75. Q: Would you be open to us conducting 1) interviews, 2) focus groups, and/or 3) surveys across each of the 4 audience segments?**

A: We do not have expectations. We are interested to see what the vendor would recommend.

**76. Q: Can you provide some illustrative or real examples of what you consider Denver Foundation's competitors [i.e., are they regional/community foundations in Metro Denver, national foundations, or other funding fiduciaries (Fidelity or Vanguard DAFs), or other?]**

A: We consider other community foundations in Metro Denver, and other funding fiduciaries as our competitors: Rose Community Foundation, Community First Foundation, Fidelity Charitable, Schwab Charitable, Vanguard Charitable.

**77. Q: Are you looking for a single firm that can provide both Audience Research / Marketing Strategy and in-house Brand / Visual Identity capabilities? In other words, would you be open a partnership proposal among 2+ firms/entities that provide discrete expertise (e.g., audience research/segmentation/marketing, branding/logo/visual identity)?**

A: We are open to a partnership proposal, but we may not undergo any brand/ visual identity project depending on what we learn from the audience research.