



# REQUEST FOR PROPOSAL

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STRATEGIC GROWTH CAMPAIGN POSITIONING STUDY

Friends of Valle de Oro National Wildlife Refuge

7851 2<sup>ND</sup> STREET SW  
ALBUQUERQUE, NM 87105

505-750-3383

[WWW.FRIENDSOFVALLEDEORO.ORG](http://WWW.FRIENDSOFVALLEDEORO.ORG)



**FRIENDS OF  
VALLE DE ORO**  
NATIONAL WILDLIFE REFUGE

**Friends of Valle de Oro National Wildlife Refuge  
Request for Proposal  
Strategic Growth Campaign Positioning Study**

**Table of Contents**

Overview .....2

Additional Information .....3

RFP Purpose .....3

Organizational Background.....4

Friends’ Objectives.....5

Financial Review .....6

Valle de Oro National Wildlife Refuge Visitor Center and Restoration Background .....6

Positioning Study Objectives and Deliverables.....7

Proposal Format and Scope .....8

Anticipated Schedule .....10

Evaluation Process .....10

Submissions .....11

## Overview

The Friends of Valle de Oro National Wildlife Refuge (Friends) is seeking proposal submissions from fundraising consultants to provide professional services for a strategic growth campaign positioning study (Phase 1) and potential fundraising campaign (Phase 2). The Friends are seeking support for a fundraising campaign to support capital projects at Valle de Oro National Wildlife Refuge as well as build capacity for the sustainability of the Friends organization into the future.

The Friends are requesting proposals for Phase 1 of this strategic growth campaign at this point, focused on a campaign positioning study, which is anticipated to begin in October 2019 with conclusion in June 2020. A decision to embark on Phase 2, including carrying-out a Strategic Growth Campaign and a determination on consulting service needs, will be made by the Friends board of directors and executive staff based on the outcome of the positioning study and may include a separate request for proposal.

**Contact Person:** Aryn LaBrake, Executive Director  
aryn@friendsofvalledeoro.org  
505-750-3383

**Date of Issue:** June 28, 2019

**Due Date:** July 29, 2019, 5:00 pm MST

**Submit to:** Friends of Valle de Oro National Wildlife Refuge  
Aryn LaBrake, Executive Director  
7851 2<sup>nd</sup> Street SW  
Albuquerque, NM 87105  
aryn@friendsofvalledeoro.org

### Board of Directors:

|   |   |
|---|---|
| David Barber – President, Development Committee | Ann Hodges – Director, Development Committee    |
| Teri Jillson – Vice-President, Co-Founder       | Joan Morrison – Director, Education Committee   |
| John Kwait – Treasurer, Governance Committee    | Katelin Fisher – Director, Membership Committee |
| Susan Torres – Secretary, Outreach Committee    | Lynn Mazur – Director, Refuge Development       |

The RFP is available on the Friends of Valle de Oro National Wildlife Refuge website at:  
[www.friendsofvalledeoro.org/news-and-announcements/](http://www.friendsofvalledeoro.org/news-and-announcements/)

## Additional Information

1. The RFP is available on the Friends of Valle de Oro National Wildlife Refuge website at: [www.friendsofvalledeoro.org/news-and-announcements/](http://www.friendsofvalledeoro.org/news-and-announcements/)
2. Organizations are responsible for checking the Friends of Valle de Oro National Wildlife Refuge website to assure they are responding to the most recent version of the RFP, any addendums, and answers to questions.
3. For a review of the RFP and if there are questions pertaining to the RFP, you are requested to join a conference call on July 12<sup>th</sup> from 1:00 pm – 2:00 pm MT. If possible, please submit questions at least 48 hours in advance of phone conference via email to [aryn@friendsofvalledeoro.org](mailto:aryn@friendsofvalledeoro.org), using the subject line “Strategic Growth Campaign RFP Question.” Phone conference call in details will be posted on the website in advance of the call at [www.friendsofvalledeoro.org/news-and-announcements/](http://www.friendsofvalledeoro.org/news-and-announcements/)
4. This RFP does not commit the Friends of Valle de Oro National Wildlife Refuge to award a contract or to pay any costs incurred in preparation of proposals responding to the RFP. The Friends of Valle de Oro National Wildlife Refuge reserves the right to reject any or all proposals and re-advertise. All proposals become the property of the Friends of Valle de Oro National Wildlife Refuge.
5. Please submit six (6) printed copies to the Friends of Valle de Oro National Wildlife Refuge address noted in the Overview section (Pg.1) no later than 5:00 PM MT on July 29, 2019.
6. All submitted proposals are binding until October 10, 2019, (ninety [90] calendar days following the submission due date).

## RFP Purpose

The Friends of Valle de Oro National Wildlife Refuge (Friends) seeks proposals from fundraising consultants interested in working with the Friends to (i) assess the philanthropic community’s interest in supporting a strategic growth campaign; (ii) assess the Friends’ capacity to execute a campaign; and (iii) develop a campaign plan, including proposed case statements, based on such assessments. The Friends seek proposals from qualified consultants to conduct a positioning study to assess internal capability and community interest to support a strategic growth campaign including, but not limited to, raising funding for facilities, amenities and restoration work at Valle de Oro National Wildlife Refuge (Refuge) and funding an endowment or other avenues to sustain and grow the Friends’ and Refuge’s programs and vision.

This positioning study should determine how much capital can realistically be raised and in what duration of time. Additionally, the study will identify internal capability and external interest and capacity, potential partners or partnership strategies, challenges, potential finance/investing options, and other issues including roadblocks for the Friends to consider. After this study is conducted, the campaign consultant may support the development and potential execution of the strategic growth campaign plan.

## Organizational Background

We share our backyards with hundreds, even thousands, of different plants and animals. However, wildlife habitats in and around American cities are shrinking. Fortunately, in Albuquerque, our backyard is home to the first urban wildlife refuge in the Southwest, Valle de Oro National Wildlife Refuge (NWR).<sup>1</sup> This Refuge conserves 570 acres neighboring the Rio Grande and is just minutes from New Mexico's largest city. By restoring this vital habitat and the unique species that call it home, Valle de Oro NWR supports the health and diversity of wildlife, people, and our community. The Refuge, founded with the help of a group of dedicated community members, supports the local economy and creates opportunities to discover and connect with nature close to home.

Valle de Oro NWR focuses on wildlife and habitat restoration and reconnecting people to the natural world, with an emphasis on young people. Valle de Oro NWR is the first Urban National Wildlife Refuge in the Southwest Region and the first new refuge to be established with habitat restored under the U.S. Fish and Wildlife Service's (USFWS) Urban Wildlife Conservation Program. As part of the National Wildlife Refuge system, Valle de Oro NWR is connected to a whole system of wildlife habitats across the country but also rooted in our local community. The Refuge is located in the South Valley of Bernalillo County just outside Albuquerque city limits 7 minutes from downtown and within 1 hour of more than half the state's population. As one of the nation's few urban wildlife refuges, Valle de Oro NWR creates a gateway for urban dwellers to connect with the broader conservation community, building engagement and support for the protection and conservation of lands beyond Albuquerque.

Currently, the Refuge is being farmed for hay and alfalfa. Migratory birds comprise the majority of wildlife on the Refuge, but as habitat is restored, it will attract a greater variety of birds, reptiles, amphibians, and native mammals. Plans for the Refuge include Bosque, grassland and upland restoration, wetlands, trails, bird blinds, overlooks, outdoor classrooms and a visitor center. We anticipate the visitor center will be completed in 2020, and habitat restoration will be done over the next 5-20 years, depending upon funding. Valle de Oro is already a field-trip destination for schools, where students come to experience nature, connect classroom curriculum to experience, and learn about the importance of conservation. In 2017, the Refuge hosted 4,000 student visits.

One of the key ways the Refuge is rooted in the community is through the nonprofit 501(c)3 support group of the Refuge, the Friends of Valle de Oro NWR<sup>2</sup>. Originally founded by a small group of community members in 2011 to assist in the establishment of the Refuge, the Friends were instrumental in advocating for and safeguarding the 570-acre former dairy farm that became Valle de Oro NWR in 2012. The Friends have a mission to shape and support Valle de Oro NWR and foster a conservation ethic by promoting environmental and cultural awareness through public participation in education programs and recreational opportunities. The Friends

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<sup>1</sup> [https://www.fws.gov/refuge/valle\\_de\\_oro/](https://www.fws.gov/refuge/valle_de_oro/)

<sup>2</sup> <https://friendsofvalledeoro.org/>

work to support the Refuge’s environmental education and interpretive programs, community outreach and engagement efforts, restoration work, and construction of its visitor and environmental education center and related facilities. The Friends serve as a model for future Urban Wildlife Refuge support groups. In upholding the USFWS Urban Refuge Standards of Excellence<sup>3</sup> which focus on connecting people to nature via stepping stones of engagement, being a community asset, building partnerships and providing equitable access, the Friends act as a valuable community liaison to facilitate engagement and input during development of future Refuge programs and infrastructure. From supporting student transportation and programming, to managing the Friends’ membership and volunteer groups, to raising funds for Refuge projects, programs, and facilities, the Friends invest in both people and wildlife.

Valle de Oro NWR and the Friends work hand-in-hand to involve the community in each stage of Refuge development. By modeling community driven conservation and tracking inclusive strategy progress, Valle de Oro NWR and the Friends are demonstrating that community involvement is imperative for future public land site development and crucial to fostering a nationwide environmental conservation ethic. This collaboration between Valle de Oro NWR, the Friends, and community partners is leading a new era of valuing community needs along with ecological needs. Together, we are working to establish strong community investment in the restoration and conservation of this important migratory way-station along the Rio Grande by developing the Refuge as a resource and asset to the local community and championing this new conservation ethic for the future.

## Friends’ Objectives

The Friends are a membership organization and have a membership base of approximately 280 active members as well as a database of approximately 1,800 contacts. Eight volunteer board members and one staff member (an Executive Director) guide the strategic direction for the Friends, including coordinating committee work organized around the Friends’ five strategic goals which guide how the Friends shape and support the Refuge:

1. **Education** – Support Refuge education and interpretive initiatives through funding and volunteers, recognizing and incorporating environmental issues of the day and cultivating a conservation ethic.
2. **Membership Capacity** – Build a large, active, diverse, and talented membership and volunteer group that provides the ongoing capacity to fully support the Refuge.
3. **Outreach and Collaboration** – Raise the Refuge’s profile and leverage our impact by communicating effectively with our stakeholders and forming diverse, dynamic partnerships.
4. **Fundraising** – Implement a successful fundraising plan that actively seeks out funding sources to provide sufficient resources to fulfill our mission, support our growing organization, and to support the Refuge’s education and interpretive initiatives, refuge development and restoration, and outreach activities.

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<sup>3</sup> <https://www.fws.gov/urban/soe.php>

5. **Refuge Development** – Support the development of the physical infrastructure as the Refuge moves from the land acquisition phase to build-out as well as related development of the neighborhood and surrounding area and facilities to enhance equitable access to the Refuge.

## **Financial Review**

The annual operating budget for 2019 is \$180,223. The Friends fiscal year is January 1<sup>st</sup> to December 31<sup>st</sup>.

In FY2018, we raised a total of \$128,809 through fundraising efforts, including membership dues (\$5,739), individual donations (\$7,442), corporate donations (\$1,529), grants (\$73,603), fundraising events (\$37,253 net), and other administrative overhead, miscellaneous income and merchandise sales (\$3,243).

In preparation for this strategic growth campaign, the Friends have reserved funds, launched a re-branding/messaging strategy and new website in 2018, and are migrating to a donor database capable of recording, acknowledging and tracking gifts, multi-year pledges, campaign tracking, matching gifts, cumulative giving and peer to peer fundraising tools. Our new database also provides access to DonorSearch, a prospect research tool.

## **Valle de Oro National Wildlife Refuge Visitor Center and Restoration Background**

Valle de Oro NWR has embarked on a design/build contract with a team of architects and designers with funding from USFWS. The scope of the work and funding available is for the main visitor center building, including an exhibit hall, nature store, offices, education building with an experiential learning pond, multi-purpose room, amphitheater, maintenance building, as well as roads, infrastructure and landscaping leading to and around the main building. However, through the process of community engagement in the visitor center and Refuge's design, the community's vision for the visitor center complex, recreational facilities and Refuge's restoration to native wildlife habitat is much greater than the current contract and funding through USFWS. Therefore, the Friends, in collaboration with Refuge leadership, have identified several future capital projects which would require fundraising to accomplish, including: building cultural gardens, a picnic area, a viewing platform, pedestrian bridges, a nature explore outdoor classroom area, interpretation around the building, a greenhouse, shade structures and restroom facilities throughout the Refuge trail system. Additionally, the Friends would like to raise funds to support habitat restoration and trail development on the 570-acre property. The visitor center complex is due to break-ground in late Summer/Fall 2019 and should be completed by the end of 2020. Habitat restoration efforts on the Refuge have already begun and are estimated to take around 5-20 years to accomplish. The Refuge received \$1 million in funding this year through federal appropriations and commitments for in-kind

contributions to accomplish some of the habitat restoration; however, the bulk of the work would traditionally be on hold until the Refuge receives additional federal appropriations. Our community has high expectations and excitement around the evolution of this property, and the Friends seek to assist in speeding up the process of habitat restoration by securing funding for select needs, including plants, seeds, water-control structures and more, which the Refuge would normally have to pay for through federal appropriation funds.

## Positioning Study Objectives and Deliverables

### Positioning Study Objectives

The strategic growth campaign positioning study is the consultant's primary deliverable. The following areas are required to be addressed:

- **Test basic planning assumptions with potential donors** - Conduct interviews with potential prospects to assess how potential donors view the Friends of Valle de Oro NWR and the Refuge. Do they consider the Refuge's goal of creating an accessible community conservation resource as important enough to place on their priority giving list? Which aspects of a strategic growth campaign would be their highest priority to support?
- **Expand prospect list** - Develop a prospective donor list to include a balance of lead donors, major donors, private foundations, grants, community partnership funds, and other potential public solicitations and networks.
- **Determine potential campaign support** - Assess prospective donors' interest and capacity to contribute to a campaign and evaluate solicitation capabilities of board members and key staff.
- **Identify other potential campaign leadership volunteers** - Interview potential volunteers to serve on a campaign steering committee to determine their individual solicitation capability.
- **Set a realistic campaign goal** - Based on assessment of donors and evaluation of solicitation capabilities of Board members and key staff, determine a reasonable range and cap for the Friends Strategic Growth Campaign.
- **Determine strategic growth campaign strategies** - Identify strengths, weaknesses and challenges with respect to attaining campaign goals. Propose strategies for implementation.
- **Develop a plan for soliciting individuals** - Using information gained through confidential interviews between consultant and donor prospects, design a step-by-step strategy for engaging individuals and securing generous priority gifts.
- **Develop a fundraising campaign plan** - Utilizing all information gathered through a variety of methods, including those listed above, compile a comprehensive recommendation for meeting the strategic growth campaign goals, including specific goals for funds raised, timeline, milestones, solicitation strategies, campaign budget and proposed case statements.



## Positioning Study Deliverables

These elements should be delivered to the Friends Board of Directors and as part of the strategic growth campaign positioning study, either in one package at the end of the study, or at key intervals detailed in the proposed positioning study timeline.

- **Situation Analysis** - Utilizing various methods, including those listed above, inventory and report on assets, challenges, and opportunities related to the campaign.
- **Case for Support** - Provide a campaign case statement(s) and story along with documentation and precedent in support of the proposed strategy.
- **Donor Prospects and Volunteer Prospects Lists** - Within the lists, identify priority prospects and networks across a full and diverse range of donor and solicitation levels.
- **Campaign Plan** - Outline a strategic growth campaign plan that includes time and dollar goals, prioritized donor segments, recommended solicitation strategies and budget, tools for training volunteers and staff, as well as campaign pyramid anticipating segmented goals from lead donors, major donors, private sector, community partnership sources, foundations, and supporters, etc.
- **Campaign Refinement** - After delivery, present the strategic growth campaign plan to the Friends Board, Staff, key volunteers and partners and refine the plan addressing their feedback.

## Proposal Format and Scope

Respondents are required to furnish one original and six copies of their proposal. The proposal must be limited to a maximum of 10 pages, not including staff resumes. Estimated price and terms for service to accomplish Phase 1 of this campaign (the positioning study) shall be provided, listing a breakdown of scope of services in a sealed envelope marked: "Estimated Price and Terms of Service."

In addition to addressing how your campaign study would achieve the items presented in the objectives and deliverables, the proposal is also required to address the following:

1. Cover Letter with organization's name, address, email, phone number, and website.
2. Contact person's name, address, email, and phone number.
3. A description of the organization including structure, areas of expertise, statement of philosophy, time in business, geographic areas of operation, number of employees, professional affiliations, and other data that helps to characterize the organization.
4. Professional resumes for the main people to be assigned this project. Include names of other consultants who may contribute and describe their relevant experience. Describe responsibilities of key people. Identify the person who would be the primary contact point for the client. Provide an organizational chart of the project team.
5. An abstract that demonstrates the organization's understanding of the project and scope of services sought.

6. Your organization's experience and, in particular, the team's experience with strategic growth campaigns for public land/environmental conservation organizations, if any.
7. A narrative description of how the organization proposes to execute the project including specific tasks.
8. How your positioning study would address the Friends' real and perceived strengths and weaknesses in fundraising, the community's perception of the Friends and Refuge, potential allies and who might oppose a campaign, potential leaders in the fundraising effort, identification of potential major donors/funders and what their interests might be, identification of the amount of money that can be reasonably raised.
9. An explanation of why your organization is the best qualified to carry out Phase 1 of this project.
10. Details on your ability to achieve monthly face-to-face meetings and/or presentations to board members (who meet on a monthly basis), especially if not local to Albuquerque.
11. An explanation of your organization's familiarity with the Friends' and Refuge's community and any work completed with organizations working in a community with a similar demographics and socio-economic status.
12. The plan for evaluating prospects and potential campaign case statements.
13. Descriptions of experience with similar projects that demonstrate effective work are welcome, as are brochures that would help evaluate the organization.
14. Details on three completed similar projects that the identified key personnel have completed within the last five (5) years. For each prior project listed, provide a summary of the project, as well as the name, address, and contact name of the client's representative who can be contacted regarding your organization's performance. Include the name of the lead organization in cases where you worked in partnership.
15. Other pertinent information that makes your organization qualified for the proposed project.
16. Proposed completion date and schedule for strategic growth campaign positioning study.
17. Other major fundraising campaigns that are launched that might compete for the same donors when entering into Phase 2 of the project.
18. Possible alternatives for raising funds.
19. Role the Board of Directors, volunteers and staff play in the study.
20. Appropriate timeframe for the strategic growth campaign positioning study (Phase 1) and an execution plan if your organization is interested in carrying out Phase 2.
21. Determine estimate price and terms of service and provide an itemized menu of services broken down by phase and cost.

## Anticipated Schedule

| <b>Item</b>   | <b>Due Date</b>          |
|---|--------------------------|
| Issue Request for Proposals   | June 28, 2019            |
| Questions Submitted 48 Hrs. in Advance of Phone Conference                  | July 10, 2019            |
| Phone Conference to Address Questions                                       | July 12, 2019            |
| Proposals Due   | July 29, 2019 at 5:00 pm |
| Evaluation Process Ends   | August 30, 2019          |
| Interviews Conducted with Finalists   | September 10 & 11, 2019  |
| Completion of Background and Reference Checks                               | September 18, 2019       |
| Notification of Award   | September 25, 2019       |
| All Respondents Notified  | September 27, 2019       |
| Completion of Contract, Confidentiality Agreement and Non-Compete Agreement | October 2, 2019          |
| Work Begins   | October 9, 2019          |
| Conclusion of positioning study   | June 2020                |

## Evaluation Process

Proposals will be evaluated by the Friends of Valle de Oro NWR using its sole discretion. The Friends, at their discretion, may seek expert advice in reviewing the responses. Following proposal scoring, the top ranked organization's individuals will be expected to travel to the Friends of Valle de Oro NWR offices at their own expense for an interview unless other satisfactory arrangements are agreed upon. Upon selection of a finalist, Friends of Valle de Oro NWR will enter into contract negotiations. If these negotiations fail, the Friends will proceed with contract negotiations with the organization scoring second, and so on. The Friends is under no obligation to make a selection under this RFP, and it reserves the right to make any selection it chooses. The Friends reserve the right to reject any and all submissions at its sole discretion, accept a proposal based on considerations other than cost, and waive or modify any provision of this RFP.

## Submissions

Submit 1 original and 6 printed copies of written proposal along with 1 sealed envelope marked “Estimated Price and Terms of Service” including your estimated costs and a breakdown of scope of services, with a postmark no later than 5:00 pm MT on July 29, 2019 to:

Friends of Valle de Oro NWR  
Attn: Aryn LaBrake, Executive Director  
7851 2<sup>nd</sup> St. SW  
Albuquerque, NM 87105

In addition to mailing your packet, you must email a PDF and word version of your written proposal no later than 5:00 pm MT on July 29, 2019 with a subject line that contains “Strategic Growth Campaign Proposal” to:

[aryn@friendsofvalledeoro.org](mailto:aryn@friendsofvalledeoro.org)

See instructions regarding submissions of estimated costs and fees for services in Objectives and Deliverables section.