

FAQs: RFP for Fundraising Consultant

Thank you to all who have reviewed and considered creating a proposal to provide fundraising consulting services to CWIP. We have received many good clarifying questions from potential consultants. Below we provide aggregated versions of the questions and answers we've received and shared, respectively, to ensure all candidates have equal access to this supplemental information.

Structure / Approach / Budget for Consulting Work

Q: What can you tell us about timing and intensity for this consulting work?

A: Depending on the scope, we expect this initial project to run 6-12 months. We do not have a set amount of time we are expecting the consultant(s) to engage, but our best estimate is it may work out to be equivalent to 1-2 days of consulting time per week across the duration of the agreement. These are general expectations but not hard parameters, so please feel free to propose what you believe is appropriate for the scope you envision.

Q: What is CWIP's budget for this project?

A: \$20K-\$40K is the current guidance from and for the Board in selecting this support. If you have a phased approach to propose, or believe CWIP should consider a scope outside that range, you are welcome to propose it. CWIP's fiscal year runs September 1 - August 31.

Q: Can a team of more than one consultants, working together, apply for this opportunity provided it fits within the overall budget range?

A: Yes, CWIP is open to one or a team of consultants working collaboratively, provided it falls in the estimated budget range.

Q: Can the consultant propose a phased approach? Is there any flexibility in timeline or approach?

A: Yes, feel free to propose the approach and timing you think is best. We are open to proposals for varied approaches.

Q: What is the format for consulting work: primarily in-person, hybrid, primarily remote?

A: This will be primarily remote, with a possibility of some in-person meetings/events (e.g., possible in-person kick-off, possible occasional in-person fundraising committee meetings, and potential attendance at CWIP events or programs).

Strategic Priorities / Role of Consultant

Q: What are CWIP's fundraising priorities for this initial engagement (i.e., types of funding, types of funders, etc.)?

A: We are looking for recommendations about what our priorities should be for an appropriately diverse portfolio given our organization's history, audience, and current/future capacity. We currently have most of our fundraising tied to institutional sponsorships (across corporate, private, and family foundations) of our annual luncheon, and we have submitted a few grant applications on a limited basis for programming support.

Q: What will the role of the consultant be? How much of the work is developing strategy development, versus fundraising strategy execution, during the engagement?

A: We are first looking for help with (1) a strategic fundraising plan/approach to determine which types of opportunities we can and should pursue and (2) what kind and level of capacity we need to invest in to succeed.

We are also starting a fundraising committee, as most of our fundraising is currently run through the CWIP board and our annual luncheon committee. We will be looking for the consultant to help us get the fundraising committee's charter and purpose fully established and determine who does what across consultant/committee/CAM (association management firm)/board/etc.

Said another way, what we are looking for includes:

- Capacity, guidance, perspective, leadership, organization, help with prioritization, etc.
- Developing a strategic fundraising plan/approach to determine which types of opportunities we can and should pursue and what kind and level of capacity we need to invest in to succeed (across Board leaders, committee leaders/members, CAM, etc.).
- When/how to prioritize other opportunities. Now our fundraising is primarily institutional and event-based. We have significant mentorship, leadership and professional development, and racial equity and social justice programming that we believe are quite fundable, beyond being a membership organization.

Q: What will the focus of fundraising efforts be as it relates to CWIP, organizationally and/or programmatically?

A: We want to look at the organization and its programming holistically. We expect to continue to fundraise around certain events such as the Annual Luncheon, and we expect that some of our mentorship programs (GIRLS, WLMP) as well as Racial Equity and Social Justice programming could attract program investments.

Q: How will CWIP measure success for this work?

A: The initial work, and success definition, will be around getting strategic clarity and capacity built/allocated. We are looking for a plan to get to the revenue level stated in the RFP, so while we do not expect it to be achieved in this initial engagement period, we would like part of the project to include projections and a timeline/dependencies for reaching those projections.

CWIP Current State

Q: What is CWIP's current state for fundraising/development infrastructure (e.g., staffing, CRM, donor/funder data, current relationships, etc.)?

A: Currently, our fundraising is all done by volunteers. Most of which is done for our Annual Luncheon, but volunteer leaders have also written a few grants as well. With our volunteers all in philanthropy in some way, we certainly have some skill here, and it's a challenge not having central fundraising staff capacity.

Currently, fundraising operations (payment tracking, donor/sponsor recognition, etc.) are managed by Chicago Association Management (CAM). All fundraising strategy, cultivation, and solicitation activities are currently done by CWIP volunteers.

We currently do not have a CRM system for fundraising (we do for membership but not fundraising beyond basic gift transaction tracking). We currently use a spreadsheet among solicitors to track sponsor outreach and commitments.

You can view our sponsors from the 2025 Annual Luncheon here:

<https://www.cwiponline.org/making-a-difference-luncheon-info/2025-annual-luncheon>.

Q: What role do board and committee members currently play in fundraising, and how do you see that evolving with consultant involvement?

A: See above.