URGENT, Inc.

REQUEST FOR QUALIFICATIONS (RFQ)
Brand Strategy & Donor Communications Development

Project Duration: 12 months
Budget Range: $30,000 – $50,000
Proposal Deadline: April 3, 2026, 11:59 PM EST
Start: June 15, 2026
Submit to: saliha@urgentinc.org
Subject: Comms Vendor RFQ-Vendor Name

Organizational Context

About Us

We turn creativity into opportunity.

URGENT, Inc. is a place-based creative youth development organization that builds creative learning pathways where young people—from elementary through early adulthood—turn talent into income, voice, and public impact through film, media arts, culture, and entrepreneurship.

Key Facts

Established	1994
Annual Budget	$1.2M
Youth Served	125+ annually
Geography	Miami, FL (headquartered in Historic Overtown)
Focus	Media arts + workforce development

Current Communications Capacity

- Staffing: 0.5 FTE Part-Time Communications Officer (starting April 2026) + CEO
- CRM: Levitate (currently in use; optimization, contact migration, and segmentation configuration required as part of this engagement)
- Current Assets: Website, social media presence (Instagram, Facebook, LinkedIn, YouTube), email list, event-based content, in-house media services team
- Gaps: Limited formal brand framework, Limited consistent donor engagement strategy, no donor segmentation, no case for support materials, no pitch deck
- Challenge: Develop the systems, tools, and frameworks to intentionally engage individual donors year-round.

Donor Database Context

URGENT has completed an analysis of individual donor data spanning 2015–2025. Key findings inform the strategic priorities of this engagement and should shape vendor's approach:

- Retention Rate: Current year-over-year donor retention is approximately 30%, below the nonprofit sector standard of 40–45%. Structural gaps in stewardship and year-round engagement are the primary drivers—not mission misalignment.
- Lapsed Donors: 229 lapsed donors. Of these, 27 are high-value donors ($500+ lifetime), accounting for significant reactivation potential. These are warm relationships, not cold prospects.

- Repeat Donors with Upgrade Potential: Approximately 50 repeat donors in the $100–$249 range show giving patterns consistent with mid-level upgrade readiness but have received no differentiated stewardship.
- Revenue Concentration Risk: 76% of individual giving revenue comes from gifts of $1,000 or more, creating organizational vulnerability. Mid-level donor cultivation ($500–$999) is critically underdeveloped—only 30 gifts at this level have been received over 10 years.

> **Vendor Implication**
> *Vendors should demonstrate familiarity with mid-level donor development strategies and the communications infrastructure required to move donors from first gift to sustained, upgraded giving. The segmentation framework, messaging maps, and CRM workflows developed through this engagement are designed to directly address these data-identified gaps.*

Internal Capacity & Availability

Vendors should account for the following internal staffing commitments when structuring their proposed workplan and timeline:

Role	Availability & Responsibilities
CEO	15–20% time allocation. Responsible for strategic oversight, major donor cultivation, personal outreach, final approvals, and board alignment.
Communications Officer	15–20 hours/week. Responsible for CRM optimization, campaign execution, vendor coordination, content curation and development, analytics, and workflow management.
Program Staff	2–4 hours/week. Responsible for youth content identification, participant outcome data compilation, content capture, and showcase coordination.

Pre-Engagement Preparation (April–June 2026)

URGENT's Part-Time Communications Officer joins the team in April 2026, two months prior to the anticipated vendor start date. During this period, URGENT will undertake the following preparatory work to accelerate Phase 1 and maximize the vendor engagement timeline.

> **Why This Matters for Vendors**
> *Give Miami Day—URGENT's primary individual donor revenue campaign—falls in mid-November 2026, which is Month 5 of this engagement. Pre-engagement preparation is designed to compress discovery and ensure campaign-ready tools are available by October 2026. Vendors who understand this timeline constraint and plan their workload accordingly will be prioritized in the selection process.*

Pre-Engagement Activities (Led by CEO & Communications Officer)
- Comprehensive donor data audit of all records (2015–present)
- Input of donor data into CRM (Levitate), data cleanup, and initial donor segmentation by giving history, lifetime value, retention status, engagement level, and cultivation potential
- Configuration of basic automated acknowledgment workflows in Levitate
- Identification and preliminary outreach to stakeholder interview candidates (board, donors, alumni, youth, community partners) for vendor-led discovery
- Compilation and organization of existing communications materials for vendor brand audit review (past newsletters, social content, donor appeals, website analytics, email performance data)
- Internal leadership alignment on strategic priorities and key messaging instincts prior to vendor kickoff

Vendors should anticipate arriving at project kickoff with preliminary donor data segmentation substantially complete, stakeholder interviews partially scheduled, and an organized communications materials archive ready for review. This preparation is designed to compress Phase 1 discovery and protect the Give Miami Day campaign timeline.

Project-Level Success Metrics

The following outcome targets reflect URGENT's organizational goals for the 12 months following project completion. These metrics represent the outcomes this vendor engagement is designed to support. While the vendor is not responsible for achieving these outcomes, proposals should demonstrate how the proposed deliverables and approach are designed to drive toward them.

Systems Outcomes (Shared)

- Fully optimized and segmented Levitate CRM with clean historical donor data and automated stewardship workflows
- Quarterly donor communications calendar implemented and in active use
- Defined board and CEO cultivation roles aligned with donor tiers

Revenue Outcomes (In-Direct)

- Increase donor retention; Target > 30%
- Reactivation of high-value lapsed donors; Target 8
- Enrollment in new monthly giving program; Target 25
- Upgrade repeat mid-level donors; Target 10
- Grow individual giving revenue; Target 15%

Collateral Outcomes (Shared)

- Formal Case for Support (internal and external versions) in active use
- Donor pitch deck used in cultivation meetings
- Messaging framework adopted across all donor-facing materials
- Brand guidelines adopted across all donor-facing materials
- Newsletter templates in active use
- Donor segmented email campaigns operational
- Updated donor-facing website content live with clear giving pathways
- Donor stewardship playbook in active use by Communications Officer

Scope of Work

The selected vendor will lead development and implementation over 12 months, working in partnership with our Part-Time Communications Officer and CEO. We are seeking a capacity-building approach—not just deliverables, but knowledge transfer, coaching, and systems that enable our small team to execute donor engagement independently.

Our Storytelling Philosophy

A best-fit partner will embrace an asset-based, strengths-forward approach to strategic storytelling. We reject deficit narratives that position youth as broken, at-risk, or in need of saving. We refuse to center the nonprofit as

the hero of the story. Instead, we seek a partner who can help us tell stories that honor who young people are and what they're building.

Storytelling Components:
- Context: Ground story in place and community—history, culture, creative legacy. Not as backdrop to poverty, but as fertile ground for talent.
- Strengths: Spotlight what youth bring—creativity, skills, cultural knowledge, agency. They are artists and professionals in development, not empty vessels.
- Aspiration: Center what youth are building toward—dreams, career goals, visions for community's future.
- Co-Action: Describe our role as platform, partner, connector—creating space and opportunity, not 'transforming' or 'empowering.' Youth are agents; we are infrastructure.
- Outcome: Share concrete achievement (paid gig, skill mastered, story told) + youth's own voice describing what it means.
- Invitation: Invite audiences to invest in talent, opportunity, community strength—not charity.

PHASE 0 — Pre-Engagement: April – June 2026

This phase is executed by URGENT staff prior to vendor kickoff. It is listed here to communicate what will be ready at project start and to set expectations for the discovery sprint in Phase 1.

Key Deliverables (Internal)

- Levitate CRM cleaned, contacts migrated, and initial donor segments configured
- Stakeholder interview candidates identified and outreach initiated
- Existing communications materials compiled and organized for vendor brand audit
- Internal leadership aligned on strategic priorities

Phase 0 Complete When:
- ✔ Donor data audit complete with preliminary segmentation in Levitate
- ✔ At least 10 of 15–20 stakeholder interview slots scheduled
- ✔ Communications materials archive ready for vendor review
- ✔ CEO and Communications Officer aligned on strategic messaging instincts

PHASE 1 — Foundation: Months 1–2 (June 15 – August 15, 2026)

Timeline Note
Phase 1 is compressed to 8 weeks by design. Pre-engagement preparation (Phase 0) eliminates the logistical overhead that typically extends discovery. Vendors must be prepared to move quickly at kickoff. If stakeholder interviews cannot be completed within the first 6 weeks, the Give Miami Day campaign timeline is at risk.

Discovery & Strategy

Required Deliverables:
- Brand Audit. Competitive landscape analysis (Miami creative youth development ecosystem + individual donor market), review of compiled communications materials and channels, Levitate CRM assessment and

segmentation validation (building on Phase 0 work), gap analysis with specific attention to donor engagement infrastructure needs.

- Stakeholder Engagement. Complete 15–20 interviews/focus groups with board members, staff, youth participants (current and alumni), current donors, lapsed donors, community partners, and local champions. Logistics coordination largely complete from Phase 0; vendor leads facilitation and synthesis. (Vendor leads; Communications Officer coordinates remaining logistics.)
- Donor Audience Research. Segmentation framework for 5 donor types (first-time, repeat, monthly, major, lapsed) with personas showing what each segment values, how they engage, what messaging motivates action. Include analysis of family foundation and DAF manager expectations. Build on Levitate segmentation completed in Phase 0.
- Audit Recommendations Report. Synthesized findings with strategic recommendations, documented impact baseline, donor engagement gap analysis, presentation to board/leadership.

Brand Foundation

Required Deliverables:

- Core Messaging Framework. Mission/vision refinement (if needed); value proposition (3 formats: 1 sentence, 1 paragraph, 1 page) optimized for donor audiences; 3–5 messaging pillars with supporting proof points; key differentiators that highlight place-based strength + track record; guidance on balancing local authenticity with broader donor appeal.
- Donor Messaging Maps (5). One-page guides showing how to tailor core messages for each donor segment—what language resonates, what proof points matter, what calls-to-action work.
- Brand Character & Voice. Personality attributes, tone guidelines, brand adjectives that reflect community roots and professional credibility while building donor trust.
- Messaging Workshop. Train staff and board on how to use messaging framework in donor conversations, with specific guidance on youth-centered, asset-based storytelling and making compelling asks (2-hour session).

Phase 1 Success Metrics

- 90% stakeholder participation in discovery process
- Documented organizational history and donor engagement baseline
- CEO can deliver value proposition
- 100% of staff can name top 3 messaging pillars
- Draft messaging tested with 3 representative donors (one from each category: first-time, repeat, major)

CRITICAL MILESTONE: End of Phase 1 (August 15, 2026)
Core messaging framework approved by CEO · Donor messaging maps complete for all 5 segments · Levitate CRM segmentation validated and donor segments confirmed · Give Miami Day campaign narrative drafted based on approved messaging

PHASE 2 — Build + Give Miami Day Sprint: Months 3–5 (August 15 – November 2026)

Give Miami Day Is the Central Deadline for This Phase
Give Miami Day (mid-November 2026) is URGENT's primary individual donor revenue campaign and the organizing deadline for Phase 2. All brand, messaging, and campaign tools must be campaign-ready by October 1, 2026 (Month 4). This is a non-negotiable milestone. Vendors who cannot commit to this delivery date should not apply.

Visual Identity

Required Deliverables:

- Logo. Refresh/refinement if warranted by audit (must first assess need and gain organizational consensus); if existing logo is strong, provide comprehensive usage guidelines only.
- Visual System. Color palette, typography system, image style guidelines (must reflect brand personality and build donor trust).
- Brand Guidelines. Document covering logo usage, colors, fonts, imagery, voice/tone, messaging, with specific guidance on youth-centered storytelling for donor communications and avoiding deficit narratives.
- Template Toolkit. Letterhead, business card, master presentation deck (donor pitch template), one-pager template, email signature standards, donor thank-you card template.

Priority Donor Communications Tools

Required Deliverables:

- Case for Support (Donor-Focused). Internal messaging library (8–10 pages) covering: organizational history and place-based credibility, problem framed as opportunity (asset-based), solution positioning URGENT as platform for youth talent, proof of impact with evidence + youth voice + outcomes, financial sustainability and organizational capacity, the investment opportunity (not charity ask); 2-page external narrative and 1-page leave-behind; specific funding opportunity 1-page template. Vendor provides framework/draft; Communications Officer adapts for different donor types.
- Donor Pitch Deck (10–12 slides). Visual presentation for individual donors, family foundations, DAF managers. Designed in brand, editable for internal team, with guidance on customizing by donor type.
- Donor Segmentation Messaging and Automation. Segmentation frameworks integrating with Levitate CRM workflows; message templates for each segment (welcome emails, thank-yous, impact updates, upgrade asks); moves management strategy showing donor progression from first gift to major donor.
- Website Donor Page Refresh. Content refresh with specific focus on donor journey clarity, call-to-action optimization, and conversion pathways from visitor to donor.
- Design Consultation. 2–3 hours of design review/input on website implementation (Communications Officer manages execution with existing web platform).

Give Miami Day Campaign Sprint (October 2026)

Give Miami Day serves as the first full deployment of the messaging framework, segmentation maps, and CRM workflows developed in Phase 2. This is not a standalone campaign deliverable—it is the proving ground for everything built in Phases 1 and 2. The following campaign-specific materials must be complete and approved by October 1, 2026:

- Pre-campaign cultivation email (2–3 weeks prior), with segmented versions by donor type
- Give Miami Day launch email sequence (launch, mid-day, last-chance) with donor segment variations
- Give Miami Day landing page
- Board ambassador and peer-to-peer messaging template
- Social media content sequence for campaign day (minimum 3–4 posts)
- Post-campaign thank-you and impact email sequence (within 72 hours of campaign close)
- Levitate CRM workflow to tag, segment, and trigger stewardship follow-up for new and returning Give Miami Day donors

Year 1 vs. Year 2 Context: Give Miami Day 2026 will be the first deployment of the new messaging and segmentation infrastructure. Results should be documented as a baseline for comparison. The full power of the system—with a complete year of stewardship data and optimized segments—will be realized in Give Miami Day 2027, which falls after the engagement period and will be executed independently by the Communications Officer.

Phase 2 Success Metrics

- Brand kit used in all new donor-facing materials
- Pitch deck used in funder meetings within the first 3 months of development
- Case for support distributed to 100% of board members + used in board fundraising
- Website content refresh completed and live with clear giving pathways
- Give Miami Day campaign fully built, tested, and launched
- Post-campaign analysis completed and documented for Phase 3 optimization

CRITICAL MILESTONE: October 1, 2026 (Month 4)
Core messaging framework, segmented email templates, and CRM workflows operational · Give Miami Day campaign sequence built and approved in Levitate · Brand toolkit complete and in use · CEO and board ambassador outreach materials ready

PHASE 3 — Activate: Months 6–9 (December 2026 – March 2027)

With Give Miami Day complete and the core brand and campaign infrastructure in place, Phase 3 focuses on building out the year-round donor engagement system, launching the monthly giving program, and preparing for the annual student showcase as a donor cultivation event.

Donor Engagement Strategy & Content

Required Deliverables:
- Annual Donor Communications Calendar. Month-by-month plan showing: 2–3 annual appeals (timing, audience, messaging angle), quarterly newsletters (themes, content mix), stewardship touchpoints by donor tier, and key campaign moments including Give Miami Day and year-end giving. Template that the Communications Officer can execute year after year. Give Miami Day should be treated as the primary campaign activation moment, with full pre- and post-campaign communication sequences mapped.
- Donor Communications Framework. Implementation guide for donor engagement cycle with tiered thank-you protocols by gift level, reporting frequency and content templates, and moves management tactics to convert one-time → recurring → major donors.
- E-Newsletter Template + 3 Pilot Editions. Designed template with content structure guidance; 3 sample newsletters drafted and approved (Communications Officer executes going forward).
- Social Media Content Framework. Content pillars aligned with donor messaging, post types/formats, example content bank with youth-centered storytelling examples, guidance on connecting social content to donor acquisition (not ongoing social media management).
- "Reel Supporters" Monthly Giving Program Launch. URGENT will launch a named monthly giving program—"Reel Supporters"—designed to create an accessible entry point for smaller donors to deepen long-term commitment. Vendor will develop: program launch messaging and email sequence; giving page content and CTA language; welcome sequence for new monthly sustainers; sustainer-specific thank-you and stewardship communications; and Levitate CRM workflow for monthly donor tracking and retention.

Donor Cultivation Integration: Annual Student Showcase (May 2027)

URGENT hosts an annual student showcase each May, featuring youth-produced films, media projects, and creative work across program levels. This event already serves as a high-impact visibility moment with board members, community partners, and program families. As part of this engagement, the vendor will help URGENT intentionally elevate this event as a donor cultivation and stewardship experience—ensuring that philanthropic audiences are welcomed, recognized, and moved toward deeper investment.

This is not a new event. The vendor's role is strategic repositioning and materials development:

- Donor Invitation Strategy: Segmented invitation language and outreach sequence for current donors, lapsed donors, and prospects by tier
- Event Framing Materials: Brief donor-facing program insert or one-pager connecting what donors see on screen to the outcomes their support makes possible
- Signage or Display Support: Brand-consistent recognition elements that acknowledge donors visibly and appropriately within the event space
- Cultivation Moment Guidance: Recommended talking points for CEO and board members for informal cultivation conversations and soft asks during the event
- Post-Event Follow-Up Sequence: Email or handwritten note templates for tiered follow-up within 48–72 hours, by donor segment

Note: Event logistics, production, and programming remain the responsibility of URGENT staff. Vendor scope is limited to the donor experience layer—the strategic framing, materials, and communications that transform an existing program event into an intentional cultivation moment.

Youth Voice Integration

Required Deliverables:
- Youth Storytelling Guidelines. Framework for ethical, authentic, asset-based youth story collection using the Context → Strengths → Aspiration → Co-Action → Outcome → Invitation arc. Includes consent protocols, voice preservation standards, narrative guidance, and youth approval process.
- Story Curation Process. Interview templates, photo guidelines, story formatting standards for donor-facing materials. Guidance on curating existing youth-produced content where applicable.
- Coaching Sessions. 2–3 sessions with Communications Officer on story capture, editing, and asset-based youth storytelling for donor communications.

Phase 3 Success Metrics

- Communications Officer successfully sends 3 newsletters on schedule
- Social media content published consistently (2x/week minimum)
- 5–8 youth stories collected and formatted for donor use
- 25% increase in email newsletter open rates
- Donor segmentation implemented in Levitate with tailored communications by segment
- "Reel Supporters" monthly giving program launched with target of 25 enrollees within 6 months
- Annual student showcase successfully executed as donor cultivation event, with segmented invitations sent, donor recognition integrated, and post-event follow-up completed within 72 hours

PHASE 4 — Sustain: Months 10–12 (April – June 2027)

This phase ensures the Communications Officer can execute donor communications independently. Vendor transitions from leading to coaching. All systems built during the engagement are documented, tested, and handed off with clear ownership.

Capacity Building & Sustainability

Required Deliverables:
- Donor Communications Playbook. Comprehensive 'how we work' manual covering: brand implementation standards, donor engagement workflows (from first gift to major donor), content creation processes, story collection and approval workflow, tools and templates inventory, quality control checklist.

- Quarterly Audit Process. Simple framework for Communications Officer to self-assess: Are we using brand consistently? Are donor communications on schedule? Are engagement metrics improving? What's working/what needs adjustment?
- Monthly Coaching Sessions. Communications Officer brings questions, drafts for review, and challenges. Vendor provides feedback, troubleshooting, and strategic guidance.
- Vendor Transition Plan. Clear handoff documenting what Communications Officer owns independently, when to seek outside help, and recommended ongoing support needs.

Phase 4 Success Metrics

- Communications Officer can execute donor communications independently (newsletters, appeals, social media)
- Donor communications playbook in active use
- Increase in contributed revenue from individual donors (tracked over 18–24 months)

Engagement Complete When:

✔ Communications Officer independently executes full donor communications calendar
✔ Levitate CRM segmentation and automation workflows operational without vendor support
✔ "Reel Supporters" monthly giving program self-sustaining
✔ Annual student showcase donor cultivation strategy documented for repeat execution
✔ Donor communications playbook complete and in active use
✔ Transition plan signed off by CEO and Communications Officer

Project Timeline Summary

Phase	Months	Calendar	Focus
Phase 0 (Internal)	Pre-engagement	April – June 2026	CRM cleanup, donor segmentation, stakeholder scheduling, materials archive
Phase 1: Foundation	Months 1–2	June 15 – Aug 15, 2026	Brand audit, stakeholder interviews, messaging framework, donor maps
Phase 2: Build + GMD Sprint	Months 3–5	Aug 15 – Nov 2026	Brand guidelines, case for support, pitch deck, CRM automation, Give Miami Day campaign
★ GIVE MIAMI DAY	Month 5	Mid-November 2026	First full deployment of all messaging, segmentation, and CRM systems
Phase 3: Activate	Months 6–9	Dec 2026 – Mar 2027	Year-round calendar, newsletters, Reel Supporters launch, student showcase prep
★ Student Showcase	Month 9	May 2027	Annual showcase elevated as donor cultivation event
Phase 4: Sustain	Months 10–12	April – June 2027	Playbook handoff, monthly coaching, vendor transition, sustainability planning

Submission Format and Requirements

This section specifies how vendor proposals must be prepared, formatted, and submitted.

Key Dates & Submission Deadline

Milestone	Date	Notes
RFQ Released	**March 18, 2026**	*Published*
Vendor Questions Deadline	**March 25, 2026**	*All questions submitted via email to CEO*
Questions & Answers Issued	**March 30, 2026**	*Responses sent*
Proposals Due	**April 3, 2026**	*11:59 PM ET — no extensions*
Finalist Notified	**April 8, 2026**	*Internal scoring using evaluation rubric*
Finalist Interviews / Calls	**April 9–10, 2026**	*30-minute clarification call for finalists*
Vendor Selection Announced	**June 5, 2026**	*Selected vendor notified; others decline-notified*
Vendor Kickoff	**June 15, 2026**	*Phase 1 begins per project timeline*

Deadline is Firm
Proposals received after 11:59 PM ET on April 3, 2026 will not be considered.

Proposal Components

Organize your proposal in the order listed below. Each component has a stated page limit. Exceeding the page limit for any component does not result in automatic disqualification, but reviewers will note it.

Submission Instructions
Submit your proposal as a single PDF with all required sections compiled in order to saliha@urgentinc.org — Subject Line: Comms Vendor RFQ-Vendor Name. Portfolio materials, work samples, and supplementary files should be shared via an embedded link where referenced in your proposal (e.g. Google Drive, Dropbox, or a professional portfolio URL). Do not attach separate files; links ensure consistent access regardless of file size.

#	Component	Status	What to Include
A	**Cover Letter** *1 page max*	Required	Addressed to Dr. Saliha Nelson, CEO. State your firm's name, the names of lead staff who will work on this engagement. Explain why URGENT's project is a specific fit for your practice — not why you are qualified generally. Generic cover letters will be noted in scoring.
B	**Organizational Profile** *2 pages max*	Required	Brief overview of your firm — founding year, team size, areas of practice, and the organizational types you serve. Include your nonprofit client percentage, and whether individual donor communications is a primary or secondary practice area. Brief bios (3–5 sentences each) for the named staff who will lead this engagement.
C	**Relevant Experience & Case Studies** *3 pages max*	Required	Two to three case studies from comparable engagements. Each should include: client type, permission to reference (if applicable), organizational size, scope of work, your specific role, relevant outcomes, and deliverables. At least one case study must involve individual donor communications for a nonprofit. Give Miami Day or comparable campaign experience should be highlighted if applicable.
D	**Proposed Methodology & Work Plan** *3 pages max*	Required	Your proposed approach to the five-phase engagement as described in the RFQ. Address: how you would handle the compressed 8-week Phase 1 discovery window, the October 1 campaign-ready deadline, the Give Miami Day campaign sprint, and the progressive capacity-building handoff in Phases 3–4. Identify staff who will lead each phase, if applicable. This section will be evaluated on specificity.

E	Storytelling Philosophy & Sample Content 2 pages max	Required	A written statement (no more than one page) describing your approach to asset-based storytelling for youth-serving organizations. Then provide one to two samples of donor-facing content you have produced for a comparable client that demonstrates this philosophy in practice. Samples may be anonymized. Do not include general brand or marketing samples — donor targeted communications content only.
F	CRM & Technical Approach 2 pages max	Required	Describe your experience with CRM or other donor management platforms. Specify which platforms you have worked in and at what depth (segmentation, automation workflows, campaign sequences). If you do not have CRM experience, describe your plan for building proficiency before Phase 2 begins. Be specific — 'we are quick learners' is not a sufficient response.
G	Proposed Budget 2 pages max	Required	Itemized budget for the full engagement within the $30,000–$50,000 range. Break down costs by phase or deliverable category. Include proposed payment milestones (e.g., 25% at contract execution, 25% at Phase 1 completion, etc.).
H	References 1 page max	Required	2–3 professional references from past clients — at least two from nonprofit organizations. For each, provide: contact name and title, organization, phone and email, nature of the engagement, and approximate timeframe. References should be pre-notified that they may be contacted.
I	Portfolio	Required	3–5 work samples, including but not limited to email sequences, case for support documents, campaign materials, stewardship content, CRM workflow documentation, brand identity work, websites, social media graphics, or general marketing materials.
J	Value-Added & Professional Influences 1 page max	Optional	Describe any capabilities, resources, or contributions your firm would bring to this engagement beyond the stated scope — at no additional cost. This may include specialized expertise in Miami's philanthropic or creative sector, relationships with Give Miami Day or comparable campaigns, supplementary training or tools for the Communications Officer, or relevant research and frameworks your team would apply. If applicable, share two to three books, thought leaders, or frameworks in fundraising and donor communications that have shaped how your team approaches this work. Do not repeat information already stated in other sections.

Evaluation Rubric

URGENT evaluates all compliant proposals against nine criteria using a 1–4 scale. This section is shared with vendors in its entirety so that you can assess your own proposal before submitting.

§ Criterion	4 Exceeds	3 Meets	2 Approaching	1 Does Not Meet
Scale	*Specific, strategic; Demonstrates rather than claims.*	*Solid and relevant. Addresses the criterion clearly with evidence.*	*Present but general, vague, or missing key elements.*	*Absent, generic, or misaligned with URGENT's stated needs.*
A **Mission & Values Alignment**	Asset-based framing demonstrated in samples. Context named specifically — not generic language.	Appropriate framing acknowledged. Context noted without deep specificity.	Values alignment claimed but not shown in samples. Framing is neutral rather than asset-based.	Philosophy not addressed or samples are deficit-framed.
C, E **Donor Communications Experience**	2+ case studies with measurable donor outcomes. Give Miami Day or comparable campaign demonstrated.	1 strong case study with outcome data. Comparable campaign experience evident.	Nonprofit comms experience present but not donor-cultivation specific.	No individual donor communications experience demonstrated.

C, D	**Strategic Understanding of Scope**	References URGENT's retention rate, lapsed count, reactivation data, and all five donor segments with specific interventions.	References 2+ specific data points from the RFQ. Core donor challenge addressed.	General challenge acknowledged. No engagement with URGENT's specific data or segments.	Generic proposal. No evidence the RFQ was read carefully.
D	**Give Miami Day Timeline Readiness**	Explicit October 1 commitment. Phase sequencing with buffer shown. Give Miami Day sprint plan included. Phase 0 addressed.	October 1 committed. Reasonable timeline to campaign readiness demonstrated.	October 1 milestone vague or timeline leaves insufficient preparation window.	Deadline not addressed or timeline cannot achieve campaign readiness.
F	**CRM & Technical Capacity**	Levitate or comparable nonprofit donor CRM experience. Segmentation and automation treated as integrated deliverables.	Nonprofit donor CRM demonstrated. Credible, specific CRM ramp-up plan offered.	Email marketing platforms only. CRM plan is vague or reliant on client training.	No CRM experience. CRM execution treated as outside scope.
D	**Methodology & Work Plan**	All five phases with milestones, named staff, and handoff plan. Phase 0 and CO independence addressed.	Major phases covered. Communications Officer role acknowledged.	Phases described as categories, not milestones. Handoff not addressed.	Absent, templated, or ignores the Give Miami Day constraint and CO role.
G	**Budget & Value**	Within $30–50K range. Itemized by phase. Payment milestones proposed. Strong value for investment.	Within range. Reasonable itemization. Appropriate value.	Within range but poorly itemized.	Outside range without justification or scope is insufficient for the investment.
H, I	**References & Past Work Quality**	2+ nonprofit references, pre-notified. Donor communications samples with measurable outcomes.	1 strong reference. Relevant donor communications samples. Current within 5 years.	References from non-donor contexts. Samples show creative quality but not donor relevance.	References absent, outdated, or irrelevant. Samples not donor communications work.
J	**Value-Added & Professional Influences**	Specific Miami-sector assets or Give Miami Day experience offered. Fundraising thought leaders cited with genuine insight.	Relevant additions noted. Fundraising references are adequate and specific.	Generic add-ons that restate scope. References are general marketing rather than fundraising-specific.	Section absent or offers nothing beyond stated scope.

Advancement

Top 2–3 proposals advance to a 30-minute finalist call before final selection. URGENT may select without finalist interviews if a proposal demonstrates exceptional alignment across all criteria. All vendors notified by June 5, 2026. Individual feedback on proposals that do not advance will not be provided.