

Request for Proposals

Fundraising and Development Consultant

The Institute for Medicaid Innovation (IMI) is passionate about improving the lives of Medicaid enrollees, their families, and communities through the development, implementation, and diffusion of innovative solutions. IMI is a national 501(c)3 nonprofit, nonpartisan research, policy, and community power-building organization that provides independent information and analysis to inform Medicaid policy and improve the health of the nation. The work of IMI is informed, guided, and supported by an exceptional group of national experts representing academic and non-academic research institutions, advocacy and community organizations, clinician groups, Medicaid managed care organizations, state, and federal policymakers, and, most importantly, individuals, families, and communities. The Institute for Medicaid Innovation's strategic priorities provide both guardrails and guidance for strategically aligning its work with its mission.

Service Requested

IMI is inviting proposals from strategic development and fundraising consulting firms interested in providing services within two focused areas, while anchoring to the mission of IMI and focusing on community and equity. Your proposal should be prepared under the expectation of at least a one-year relationship, although IMI will reserve the right to terminate the relationship at any time for any reason with 60 days prior written notice.

As an anti-racist and gender inclusive organization, IMI employs and engages with partners and collaborators without regard to age, race, ethnicity, national origin, sex, gender, religion, political affiliation, marital status, or disability. We are continuously learning, growing, and building a culture that encourages, supports, and celebrates the diverse voices of our employees, partners, and collaborators. Diversity and inclusion fuel our innovation and connect us to the Medicaid community we serve.

Scope of Work

IMI seeks proposals for contracted development and fundraising services from a boutique firm with a team that can offer both strategic support at the senior level and general support at the junior level. All applicants must have relevant nonprofit experience, particularly development and fundraising for organizations that prioritize community voice and diversity, equity, inclusion, and justice (DEIJ). IMI will pay the selected vendor a monthly retainer as part of an annual fixed fee agreement for the services outlined below with the contract beginning January 1, 2025.

We recognize that not all development and fundraising firms interested in submitting a proposal will have expertise in all services listed below. Therefore, we are open to retaining two different firms, one for each of the two categories of services. Please only submit a proposal for the category of service that you have expertise. If you have expertise in both categories, please submit a proposal for both.

The consulting firm(s) selected will be responsible for providing the following services:

10th Anniversary Celebration Luncheon on November 18, 2025

- Project planning and management includes building out the board's initial draft work plan and own/lead the work plan.

- Lead agenda setting and attend monthly, virtual planning committee meetings, supporting and documenting the award selection process and decisions, working with the planning committee co-chairs and executive director on their vision, supporting, assigning, and tracking the completion of tasks.
- Work in partnership with operations manager (based in DC) who is leading logistics, printing, food, decoration, ordering awards, and special touches.
- Work with board, IMI team, and comms team to develop collateral for the 10th anniversary luncheon including sponsorship materials, individual participant materials, newsletter and social media text, logo, save-the-date, talking points for board members and staff.
- Develop and execute fundraising efforts including prospecting, coaching the board and executive director on meeting with potential corporate sponsors, drafting meeting materials and talking points for meetings with potential sponsors, advising the planning committee on fundraising options such as event sponsorships, table sponsors, and individual tickets. Additionally, track the status of sponsorships, providing requested information to sponsorships, supporting sponsor participation at the event such as answering questions and providing them with requested information, and recognition for sponsorships. And working with the operations manager in managing invitations, RSVPs, and requests for special accommodations for the event.
- Attend the November 18th anniversary celebration luncheon in Washington, D.C.

Grants & Contract Management

- Maintain IMI's CRM (Bloomerang).
- Work with team, led by the director of operations and strategic business development, to compile/edit team draft and finalize quarterly email update that is sent to individual funders (current and past).
- Lead the management of grant reporting including managing reporting deadlines, compiling/editing team drafts for quarterly, end of year, and end of project reports.
- Track and ensure that IMI is meeting with current funders quarterly and past funders at least twice a year. Help with scheduling these meetings, drafting agendas, creating meeting objectives and talking points, providing any contextual information about the funder's current priorities.
- Support submission process of grants (anticipate 1-4 in 2025) including providing feedback on staff draft proposals, coordinating with IMI department leads to obtain information to complete required forms, setting up login/password and portfolios in funder platforms (if not already established), submitting final documents, and working with funder on updates and responding to additional requests.
- Working with comms contractor to review and edit end of year campaign language and dates for deployment via IMI newsletter and social media platforms.
- Maintaining prospecting tracking document and attending monthly organizational development and business strategy meeting to discuss with the senior leadership team strategy and plans.
- Work with comms contractor team and executive director to finalize IMI's pitch deck.

Your Response to Our Request

Please use the following format when preparing your response. Please limit the proposal to five pages, excluding attachments.

Section 1: Proposer information: company name, primary contact, email, phone, etc.

Section 2: Scope of work/description of services and approach to communications services. Describe how your firm will approach IMI's communication needs, including the planned use of any affiliated or associated firm personnel.

Section 3: Firm's qualifications: summary of previous similar work for a nonprofit organization. Detail your firm's experience in providing communications services to 501(c)3 organizations. Please note your commitment to working with mission-oriented organizations that focus on community voice and diversity, equity, inclusion, and justice.

Section 4: Attachments.

- Cost proposal: budget and narrative providing budget justification detailing the cost per month to provide the services outlined in this RFP over a 12-month period.
- Resumes: key personnel working on this contract.
- Professional references: three references for which proposer has performed similar work; include the current contact information for each.
- Other: proposers may include a brief sample of their work or other materials to demonstrate their capabilities to perform the services outlined in this RFP, not more than three additional pages.

Our Process

Please send your proposal to Anna Bonelli, Director of Operations and Strategic Business Development, by **December 16th**. We will review all proposals and send a confirmation email receipt. We may also elect to conduct interviews with our top candidate(s) before our selection. As part of our process, please note that IMI prioritizes the selection of vendors that are local to the D.C. area and represent small businesses that are women and/or BIPOC owned and/or led.

Upon notification of the selected firm and acceptance, IMI will work in partnership to orient and onboard.

As you prepare your proposal, if you have questions or need more information, please contact **Anna Bonelli at ABonelli@MedicaidInnovation.org**.