



CONFIDENTIAL INFORMATION

## **Major Gifts Ramp-Up Service Proposal**

Proposed by Jacque Daley-Perrin, Stefanie Stark & Jimmy LaRose to:

The President and CEO of:

### **The Able Trust**

Allison Chase – Tallahassee, FL

#### **Development Systems International**

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CONFIDENTIAL PROPOSAL TO:

## The Able Trust

Allison Chase – Tallahassee, FL

**Executive Summary:** Development Systems International (DSI), responding to the request of The Able Trust (TAT), submits a proposal to begin March 15, 2024, to create and implement a comprehensive fundraising plan using DSI's Major Gifts Ramp-Up (MGRU) Program for the purpose of increasing financial capacity. DSI will work with TAT Administrators, Volunteers, and Board Members to measurably advance TAT mission through new gift acquisition in a campaign context.

Dear Allison,

Thank you for the opportunity to submit a proposal to work with TAT to plan and implement Major Gifts Ramp-Up. Per our recent conversation, the following pages overview a proposed list of initiatives to provide services regarding Organizational Development, Major Gifts Ramp-Up, Campaign Interviews and Campaign Solicitations.

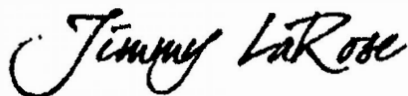
Important topics outlined in this proposal include:

- DSI Major Gifts Ramp-Up Performance Model
- First Four Months of Service Deliverables
- Biographical Overview of Assigned DSI Counselors
- Contract Terms and Agreement, and Code of Conduct
- Confidentiality Agreement

Typically, the first four months of service center on organizational development, case for support, and new donor prospecting as an overall campaign plan is developed. These tasks predicate all initiatives. In short, this process will build a foundation from which TAT will launch a successful major gift campaign. DSI will then design and implement individual plans of care that strengthen the composition of local core groups, major donors, corporations, foundations, and leadership networks to reach campaign goals.

Again, thank you for your time and consideration. We look forward to the opportunity to work with your team.

Sincerely,

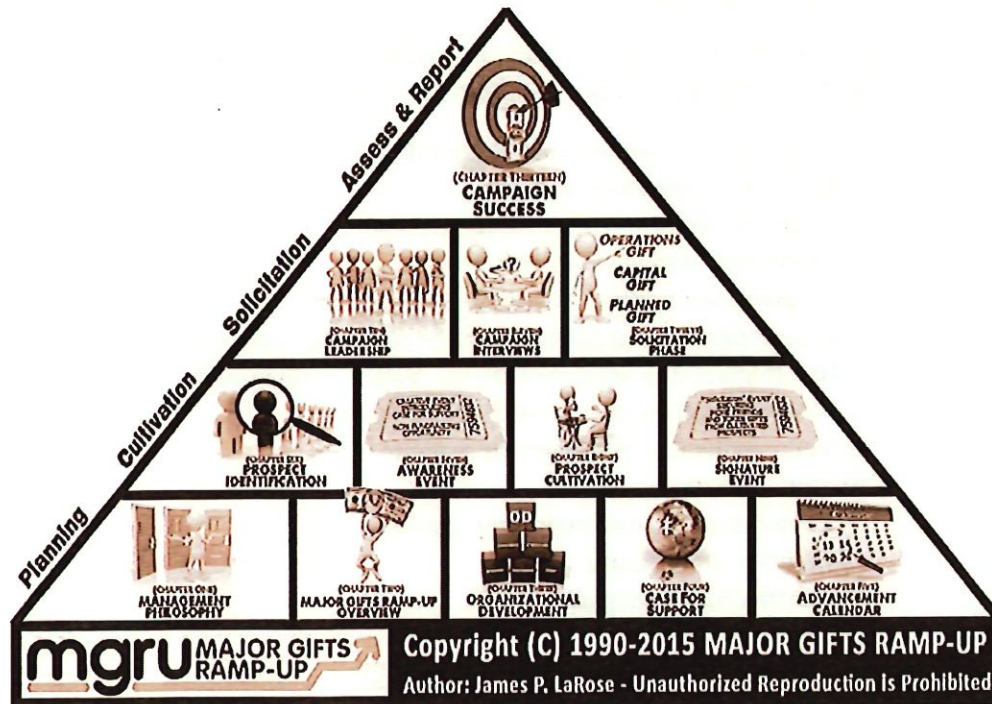


James P. LaRose, CNE, CDE, CNC  
Founder/CEO

I. HISTORY, EXPERIENCE, TRACK RECORD



DSI believes that financial resources chase after ideas and there will always be generous people who will amply support a great dream backed by a sound plan. Significant gifts are given by people who possess a willing heart. For 30 years, DSI's Major Gifts Ramp-Up Program has ensured that organizations properly identify, engage, cultivate, and invite individuals of means to stand with their respective organizations. DSI has worked with over 400 nonprofit organizations around the world ensuring that their leadership accomplishes the mission and vision entrusted to their care.



DSI measures success by ensuring you exceed your Operations, Capital, & Endowment fundraising goals. Nonprofits who implement the Major Gifts Ramp-Up Model oversee campaigns that...

- ...come in over goal
- ...are completed on schedule
- ...are executed under budget
- ...result in happy volunteers
- ...produce grateful donors
- ...promote community pride

## II. CAMPAIGN DIAGNOSTIC – PREPARING TO PLAN

In advance of our first onsite service day TAT will complete DSI's Comprehensive Campaign Diagnostic (CCD). The CCD is a confidential detailed assessment of your nonprofit that will assist our team as we lay a foundation for future expansion in development. The CCD is divided into eight sections. They are as follows:

1. Basic Institutional Data
2. Programs/Services
3. Staff/Administration/Volunteers
4. Heritage/History
5. Income/Disbursements/Finances
6. Fund Raising/Development
7. Polity/Governance
8. Upcoming Projects/Conclusion

Upon completion of the Inventory TAT will provide any existing written documentation regarding the following areas of organizational development.

1. Administrative personnel and support staff
2. Board and committee structures
3. Volunteer/advocacy/leadership programs
4. Established linkages to constituencies
5. Program, fundraising & marketing calendars
6. Annual fund, capital project & estate planning marketing materials
7. Architectural drawings, renderings, designs & blueprints
8. Marketing collaterals and website platforms
9. Donor cultivation management systems
10. Gift acceptance policies
11. Donor records and fundraising reports
12. Written strategic plans
13. Written fundraising plans

## III. SCOPE OF SERVICE – RAISING MAJOR GIFTS

### Step #1 – Management Philosophy

TAT leadership and your DSI counselors will determine who will *execute* the approved campaign plan and (as a separate matter) determine what group will take responsibility to *monitor* the execution of the plan on a daily/weekly/monthly basis.

*(Tasks will be equally shared between your DSI Counselor, TAT Administrators, and various board-committee chairs)*

## **Step #2 – Major Gifts Ramp-Up Overview**

The team will identify key leaders who represent different levels of sponsorship who should be cultivated, engaged and oriented to the proposed campaign plan. This step will ensure that the organization as a whole is unified around this new initiative.

Written cultivation plans ensuring the development of internal sponsors could include:

- a) Initiating Sponsors – Who are the trusted and competent leaders who will oversee this project bringing credibility to the campaign.
- b) Board Sponsors - All board members must be knowledgeable and openly supportive of the campaign.
- c) Sustaining Sponsors – What other sponsors must be fully briefed on the campaign? What is their role in supporting the campaign?

*(This task will be performed by your DSI Counselor supported by TAT Personnel)*

## **Step #3 – Organizational Development**

Every nonprofit is broadly comprised of Leadership, Operations, Staff, Environment & Technology. These dimensions will be inventoried and the needs/costs of each will be identified to determine a proper funding/project/campaign goal. The team will work with relevant administrators *to conduct an Organizational Readiness Review.*

*(This task will be overseen by your DSI Counselor but will primarily be the responsibility of TAT Personnel)*

## **Step #4 – Case for Support**

Making the case is the quintessential development task for any nonprofit. The process of determining Case for Support elements must reflect the unified vision of all the individuals responsible for organizational stewardship. Campaign timelines and budgets for campaign expenses and income will be identified and included with the campaign collateral materials that are developed during this phase.

- a) Categorize separate sets of services/programs unique to the organization
- b) Determine separate project/operational expansion goals
- c) Formulate associated dollar amounts for each expansion goal
- d) Write a campaign timeline with campaign completion dates

*(The gathering of existing case copy elements will be the responsibility of TAT with DSI Counselor oversight. Your DSI Counselor will adjust and finalize copy. Graphic design and printing of the case document will be the responsibility of TAT Personnel)*

### **Step #5 – Advancement Calendar**

Key team members will create step-by-step “task maps” containing numerous assignments which, when executed in order and on time, will ensure campaign success. These could include but will not be limited to:

- |                                      |                                   |
|--------------------------------------|-----------------------------------|
| a) scheduled trustees/board meetings | f) event invitation mailing dates |
| b) existing program events           | g) cultivation tour dates         |
| c) print/copy/artwork due dates      | h) campaign cabinet meeting dates |
| d) non-fundraising awareness events  | i) field solicitation dates       |
| e) signature “ask” events            | j) monthly communique dates       |

*(This task will be performed by your DSI Counselor supported by TAT Personnel)*

### **Step #6 – Prospect Identification**

Using the online prospect research tool, DonorScope, the team will first download complete contact information of major donors whose net worth exceeds \$1,000,000 who live within the service footprint of your nonprofit. Second, the team will add comprehensive wealth & financial information to each person or family in their existing database file. Third, the team will create lists of known community champions, board members and major donors who could join your nonprofit by sharing a major gift. The final step will be to record the first and last name of each prospect and then cross-reference this information against both the secured lists and internal file. If an address record cannot be located, Google, Internet White Pages, and other online resources will be used to secure complete contact information.

*(This task will be overseen by your DSI Counselor but will primarily be the responsibility of TAT Personnel)*

### **Step #7 – Awareness Events**

A non-fundraising awareness event will be held to publicly introduce the Case for Support to identified campaign prospects. An Awareness Event is a uniquely creative breakfast or lunch meeting that highlights a nonprofit’s mission and compelling Case for Support. The purpose of an Awareness Event is two-fold. First, it creatively invites the “RIGHT PROSPECTS” to learn about your mission. Second, it encourages your “EXISTING SUPPORTERS” to become more meaningfully involved. Quite often, an Awareness Event will be the first-time community champions, foundation executives, corporate leaders, or individuals of wealth and influence are introduced to the newly created Case for Support. This event will be the first significant point of contact followed by a series of cultivation “Touchpoints” that will result in earning the right to ask for a financial investment.

*(Responsibility will be shared between your DSI Counselor and TAT Personnel)*

### **Step #8 – Prospect Cultivation**

Cultivation strategies will be created that intentionally move each prospect into greater involvement with the organization. “Ask” objectives will be determined (see list below) and then supported by written Individual Plans of Care (IPOC) for each prospect. There are a variety of venues, vehicles, and methods that can be employed as touch points (see list below) when writing a prospect’s individual plan of care.

#### **“Ask” Objectives:**

- a) Board Members
- b) Committee Members
- c) Campaign Cabinet Members
- d) Campaign Visitors
- e) Foundation Givers
- f) Corporate Underwriters
- g) Major Donors
- h) Legacy Givers
- i) Local Church Advocates
- j) Performance Volunteers
- k) Event Table Hosts

#### **Touchpoints:**

- a) Phone Calls
- b) Personal Visits
- c) Onsite Tours
- d) Targeted Mail/Newsletter
- e) Civic Gatherings
- f) Email Communications
- g) Facebook Invites
- h) Twitter Messages
- i) Banquet Events
- j) Special Events
- k) Letters/Post Cards
- l) Private Receptions

*(This task will be overseen by your DSI Counselor but will primarily be the responsibility of TAT Personnel)*

### **Step #9 – Signature “Ask” Event**

The Signature “Ask” Event model will be deployed to both cultivate major donor prospects and raise smaller amounts of money in the short term. The Signature “Ask” event provides first time major donor prospects the opportunity to make their first “token” gift in advance of their participation in campaign interviews.

*(This task will be overseen by your DSI Counselor but will primarily be the responsibility of TAT Personnel)*

### **Step #10 – Volunteer Campaign Leadership**

Campaign Cabinet Members will emerge from the cultivation process. These volunteers are responsible to make the “ask” and to invite their peers to join the campaign and match their personal financial investment. Campaign Leadership’s confidence is dramatically increased when they are included in the following decision-making processes.

- a) How many gifts and what specific dollar amounts have to be raised?
- b) Who is going to be asked and for how much?
- c) Who is going to do the asking?
- d) What is the timeline to reach campaign goal?

*(Task will be performed by your DSI Counselor and supported by TAT Personnel)*

### **Step #11 – Campaign Interviews**

One of the most crucial elements of success in this process will be the identification and solicitation of top gifts. Statistical analysis suggests that the top gift will be in the range of 20% of the goal. The top ten commitments, including the first one, will be as much as 50% to 60% of the goal or success is in jeopardy. Another 30 gifts will usually equal as much as 30%. Interview processes will be developed by the Campaign Cabinet and will include:

- a) Campaign Interview Task Map Creation
- b) Orientation & Internal Information Gathering
- c) Survey Questionnaire Development
- d) Collateral Document Development
- e) Identification of Potential Donor Prospects
- f) Campaign Interviews via personal visits, focus groups, direct mail
- g) Data Compilation & Information Analysis
- h) Presentation of Cultivation Report & Recommendations

*(Responsibility for this task will fall primarily on the shoulders of your DSI Counselor but will require considerable support by TAT Personnel)*

### **Step #12 – Solicitation Phase**

The strongest volunteers will be trained in how to make the “three- part ask” including multi-year operational commitments, one-time project investment and endowment gift. It may be necessary to use staff, administration, or board members to make solicitations though the ideal presentation should include a volunteer (already in relationship) who can look their friend in the eye and invite them to give the big gift.

Each campaign visitor will be equipped with a very specific set of collateral documents (customized per campaign initiative) that keep a visitor on message and provide them the confidence they need to make the “ask.” These documents generally include:

- a) Detailed Proposal
- b) Gift Commitment Agreement
- c) Case for Support Document

*(Responsibility will be shared between your DSI Counselor and TAT Personnel)*

### **Step #13 – Campaign Success**

The success of these initiatives will be determined by the following metrics:

- a) Exceeding the pre-determined fundraising goal
- b) Completing the project on schedule
- c) Coming in under campaign budget
- d) Fostering community pride
- e) Celebrating volunteers who are happy they participated
- f) Thanking donors who are grateful they invested



#### **IV. PERFORMANCE METHOD**

##### **1. Initial Four Months Deliverables:**

- a. Perform development audit to determine existing staff/technology/leadership resources available to support your Major Gifts Ramp-Up Campaign
- b. Apply donor-driven philosophy of fundraising to both new and existing initiatives; lead board, administration, and staff through organizational development processes
- c. Develop both "institutional" and "project" case for support
- d. Calendar one-year advancement agenda recording timelines and benchmarks
- e. Originate new major donor prospect file
- f. Determine theme, venue, and uniqueness of awareness/visibility events
- g. Guide the process for establishing an initial campaign steering committee
- h. Oversee the creation of invitation packages promoting awareness event
- i. Plan for implementation of awareness events that introduce "Case for Support"
- j. Begin collateral document development for all new initiatives

##### **2. Client Service is accomplished through:**

- a. Individual Training and Skills Transference - Onsite Visits
- b. Calling Partnership – Donor Presentations, Foundations, etc.
- c. Participatory Management via Phone, Skype, and Email – Accountability to Tasks
- d. Board & Volunteer Training – Presentations to Key Individuals
- e. Nonprofit Management Digital Resource Library – The MGRU Cloud
- f. CFRE (Certified Fund-Raising Executive) and/or CNC (Certified Nonprofit Consultant) Preparation and Training

##### **3. Additional Services:**

Processes DSI will oversee throughout the engagement include:

- a. New major donor prospect acquisition through list acquisition, counselor contacts, community research and wealth screening of existing prospects.
- b. Grant research, preparation and proposal writing
- c. Board, management, staff, and campaign committee training. Our approach is comprehensive and will address all fundraising needs of TAT
- d. Sponsorship structure development including an on-site recognition program and naming opportunities
- e. Campaign materials development including a statement of the need, campaign brochure, and other appropriate materials
- f. Events oversight including scheduling, execution and promotion

#### **4. Administrative Services:**

In addition to the aforementioned services, DSI will oversee and advise TAT for various administrative services, including:

- a. Gift and pledge receivable processing, tracking and follow through
- b. Support tasks such as meeting and appointment coordination, direct mail communications, and phone campaigns
- c. Database selection and management
- d. Investment and financial services, if necessary

#### **V. MAJOR GIFTS RAMP-UP CLOUD**

TAT and DSI will rely on the Major Gifts Ramp-Up Cloud to support the implementation of this ongoing initiative. Recognized as the world's largest nonprofit digital resource library, the MGRU Cloud includes over 10,000 pages of documents, tutorials, presentations, manuals, videos, audios, curriculum and exams vital to enhancing your organization's performance. Team members will save a tremendous amount of time as they CUT-AND-PASTE their way through hundreds of projects using fresh material they own.

#### **VI. CONTRACT TERMS**

*Compensation:* For services outlined in this proposal, TAT will be charged a contract fee of \$6,400.00 per month plus pre-approved travel expenses.

*Payment Schedule:* Invoice terms are net 15 days, with a service charge of \$25.00 per month for outstanding balances exceeding 30 days. Invoices shall be issued on the 15th of each month with payment due on the first of the following month for the duration of agreed contract.

*Severance:* This agreement is subject to cancellation by either party on sixty (60) days written notice, in which event total fees due DSI shall be based on the service provided to the effective date of cancellation.

## **VII. DSI CODE OF ETHICS & CONDUCT**

DSI's Code of Conduct shall include but not be limited to individuals, members, partners, counselors, consultants, employees, vendors, suppliers, and associates providing services to DSI or DSI clients.

1. Associates shall always act in the best interest of DSI and DSI clients, providing professional services with integrity, objectivity, and independence.
2. Associates shall accept only those assignments for which the member has the qualifications, knowledge and skill to serve the client effectively.
3. Associates shall, before accepting an assignment, reach a mutual understanding with the client as to the objectives, scope, work plan, and costs. Individuals shall establish fee arrangements with a client in advance of any substantive work.
4. Associates shall avoid conflicts of interest or the appearance of such. Individuals shall not accept simultaneous assignments from two or more clients who have potentially conflicting interests without informing all parties in advance and securing all parties' prior agreement.
5. Associates shall treat clients' information as confidential and take all reasonable steps to prevent it from being accessed by unauthorized people. Individuals shall not take advantage of such privileged information for use by the individual, the individual's firm or another client, without appropriate permission.
6. Associates shall not engage in any malfeasance, dangerous behavior, or illegal activities in any matter related to an assignment and shall report to appropriate authorities within or external to a client organization any such activities discovered within the scope of an assignment.
7. Associates shall not adopt any method of obtaining business that detracts from the professional image of DSI or its members including, but not limited to:
  - advertising services in a deceptive manner;
  - misrepresenting his/her qualifications or experience;
  - denigrating other individual consulting practitioners, consulting firms, or the consulting profession.
8. Other than submitting a bid in an openly announced competition for consulting services, associates shall not knowingly undertake activities designed to appropriate business from another practitioner who has an existing relationship with a client for the same or similar services.
9. Associates shall respect the rights of consulting colleagues and firms and shall not use their proprietary information or methodologies without permission.

Amended October 2022

## SERVICE AGREEMENT

This AGREEMENT is made by and between THE ABLE TRUST located at 1709 Hermitage Blvd #100, Tallahassee, FL 32308, hereinafter referred to as TAT, and DEVELOPMENT SYSTEMS INTERNATIONAL located at PO Box 1840, Lexington, SC 29071 hereinafter referred to as DSI.

Whereas, TAT whose mission is to be a key leader in providing Floridians with disabilities opportunities for successful employment, and has expressed needs in the areas of institutional advancement, public relations, marketing, fundraising, organization, record keeping, donor relations, and management development, and has declared its intention of initiating and/or refining programs in these areas, and also has agreed to retain DSI to provide counsel and guidance in said programs for and in behalf of TAT in a consulting capacity; now, therefore,

IT IS MUTUALLY AGREED AS FOLLOWS:

1. That DSI shall provide counsel for said programs beginning March 15, 2024, through March 14, 2026, until this agreement is amended in writing as hereinafter provided.
2. Specifically included in the scope of this agreement is the implementation of the aforementioned service deliverables including monthly onsite performance visits, phone conferences and correspondence in between performance sessions. The performance role may include but not be limited to Major Donor Cultivation, Special Events, Prospecting, Foundation Solicitation, Volunteerism, Public Relations, Gifts-In-Kind, Civic Group Appeals, Sponsorship Programs, Systematized Donor Bases, Annual Banquets, Capital Campaigns, Direct Mail, Staff Development, Will Planning, Local Business Cultivation, Deferred Giving, and Living Memorials.
3. TAT agrees to give the cooperative support of the organizational leadership, board of directors, management, administrative staff, and constituencies of TAT as needed throughout the period covered by this agreement.
4. DSI reserves the right to use multiple account representatives in servicing this contract for the purpose of meeting the specific and unique needs of TAT.
5. In consideration of these premises, TAT agrees to pay DSI for services, the sum of \$6,400.00 upon the signing of this agreement and upon the first of each month thereafter or until this agreement is amended as provided herein: \$6,400.00 per month.
6. During the period of this agreement, TAT shall pay all necessary pre-approved expenses incurred in the performance of services outlined in this agreement, which may include but not be limited to telephone, meals, and other service-related expenses. TAT shall pay pre-approved reasonable and necessary travel and living expenses of DSI while engaged in work for TAT at actual cost, air travel, single rate hotel, meal costs, mileage or auto rental, and miscellaneous expenses incurred. In the event TAT cancels or postpones a previously agreed on-site visit TAT will be financially responsible for any charges or change fees incurred.

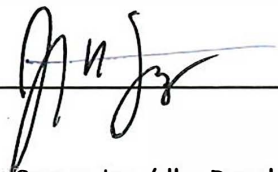
7. This agreement shall remain in full force and effect for the period covered by this agreement. Failure to comply with the payment schedule may result in an interruption of service and delays in the program calendar.
8. DSI nor any employees of DSI have any involvement directly or indirectly with the finances TAT and furthermore, DSI will not, at any time, have control or custody of contributions.
9. TAT will exercise control and approval over the content and volume of any solicitation at all times.
10. This agreement is subject to cancellation by either party on sixty (60) days written notice provided via certified mail, in which event the total fees due DSI shall be based on the service provided to the effective date of cancellation.
11. TAT may not employ directly or indirectly any DSI counselor or DSI employee for a period of twelve (12) months after the effective date of cancellation of this agreement.
12. That any modification or revision of this agreement must be in writing and is valid only when executed by the duly authorized representatives of said parties.
13. This agreement shall become effective when signed by both parties and must be signed and dated by both parties within fourteen (14) days.
14. The acceptance of the conditions stated in this agreement and the approval of both parties are hereby given as evidenced by the signatures hereto.

The Able Trust

Name Allison Chase Title President + CEO

Signed  Date March 5, 2024

Name Joseph D'Souza Title SVR

Signed  Date 6 Mar 24

PhilanthroComm, Inc. (dba Development Systems International)

Signed James P. LaRose Date March 5, 2024  
 James P. LaRose, Founder/CEO

## DATA CONFIDENTIALITY AGREEMENT

Development Systems International (DSI) agrees to be bound by this confidentiality agreement and to take all reasonable, necessary, and appropriate steps to safeguard private data provided by The Able Trust (TAT) from disclosure to anyone except as permitted under this agreement and the policies listed below.

These policies require that:

DSI may only access information needed to perform legitimate duties when implementing DSI's Major Gifts Ramp-Up Program. DSI may not make unauthorized changes to TAT information or look up, review, or analyze restricted or confidential institutional information outside the scope of agreed upon service.

DSI must protect the confidentiality, integrity and availability of TAT information. DSI may not share TAT information or access with any unauthorized individual, whether internal or external to TAT.

DSI must safeguard any and all TAT information on a secure network with no external access to any party other than DSI employees. DSI may not facilitate another's illegal access to TAT information, administrative systems or compromise the integrity of the systems information by sharing passwords, or other access information or devices.

The acceptance of the conditions stated in this confidentiality agreement is hereby given as evidenced by the signatures hereto.

Signed James P. LaRose Date March 5, 2024  
James P. LaRose, Founder/CEO