



December 23, 2003

**Request for Proposal  
Building a Strategic Fund Development Plan**

The California Budget Project (CBP) is seeking a consultant to work with the organization's Development Director and Executive Director to design and implement a strategic development plan.

The CBP is working to ensure that California's budget and policy priorities reflect the critical needs of its low- and middle-income families. Founded in 1994, the CBP has built a solid reputation for timely, accessible, and objective analyses of fiscal and economic policy issues. The CBP's unique, cross-cutting policy analysis informs public debate, contributes to the development of public policies, and helps a broad constituency participate more effectively in budget and policy decisions.

The CBP achieves its results through publications, media coverage, and presentations to a wide variety of groups. We mail materials to about 3,000 people and organizations, and about 2,500 receive email updates from the CBP. In addition, our reports are downloaded thousands of times from our website, [www.cbp.org](http://www.cbp.org).

Currently, the CBP receives over 90 percent of its funding from foundation grants. The remainder comes from conference fees, subscriptions, donations, and product purchases. We have been fortunate to receive the majority of our funding as general support; however, increasing individual support will enable us to be more flexible in the future.

**Goals:**

Through a strategic development plan the CBP hopes to:

1. Examine our current mix of funding sources (foundations, subscriptions, donations, conference fees, and product purchases), determine an appropriate mix for the organization, and develop a strategy for achieving that mix.
2. Establish a framework for identifying, maintaining, and upgrading individual and organizational subscribers and donors.
3. Explore ways to expand the CBP's reach, and thus its ability to raise funds from more diverse sources, through better marketing of the organization and its work.

**Challenges:**

1. The CBP has a small individual fundraising base, but a mailing list of several thousand. Only about 10 percent of those receiving CBP materials have paid for a subscription or

given money in the last 12 months; up to one-third have paid or given at least once in the last five years.

2. While list development is a priority, the CBP's non-negotiable policy respecting the privacy of its subscribers and donors makes list swapping impossible.
3. The current board only minimally participates in fundraising and does not expect to do substantial fundraising.

**Opportunities:**

1. The CBP has a well-developed and annually updated strategic plan.
2. The CBP is not in an imminent funding crisis.
3. The CBP has been very successful in securing ongoing foundation support.
4. The CBP recently hired a Development Director whose job it will be to assist with developing this plan and ensuring its implementation.

The consultant will work with the Development Director, Executive Director, and Associate Director to develop and implement a short-term development plan for 2004, a strategy for updating this plan on an annual basis, and a longer-term (3-5 year) strategic development plan to complement the CBP's overall strategic plan.

The estimated cost of this project is between \$12,000 and \$15,000 and is open to negotiation. Cost will be one, though not the most important, consideration in evaluating bids.

To apply, submit a letter and resume, biography, or curriculum vitae to the address below. In your letter include a description of your approach, a general timeline and your availability, and a statement of your rates. Include a recent client list with contact information, highlighting those for whom you have done a development plan. Proposals will be accepted until we have chosen a consultant. Early proposals are encouraged.

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Submissions by regular mail are preferred.

For more information on the California Budget Project, please visit the website - **www.cbp.org** - or contact John Lewis.