

Washtenaw Intermediate School District

1819 S. Wagner Road
P.O. Box 1406
Ann Arbor, MI 48106-1406

**REQUEST FOR PROPOSAL
For**

My Future Fund: Fundraising Consultant



Issued By:

Washtenaw Intermediate School District

Contact:

Sarah Hierman
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E-mail: schierman@washtenawisd.org

Sealed replies to this proposal must be received no later than 3:00pm, Friday, June 20. Late proposals will not be accepted. Submittal by fax is not acceptable. Please submit one hard copy response with original signatures.

A bid opening will be held on Friday, June 20, 2025, 3:00-3:30pm, at the Washtenaw Intermediate School District's Teaching & Learning Center located at 1819 S. Wagner Rd., Ann Arbor, MI 48106.

I. Introduction

DEFINITIONS

The District – Refers to the Washtenaw Intermediate School District.

You/Your/Vendor/Bidder/Contractor – Refers to all recipients of this Request.

Bid/Proposal - Refers to the entire process and includes the request, special provisions, specifications and/or requirements.

REQUEST CLARIFICATION

Questions regarding this Request should be directed **in writing**, preferably by e-mail, to the contact specified on the title page, no later than 5:00pm, Friday, June 6, 2025. Questions and subsequent responses will be compiled in an FAQ, which will be available through the proposal deadline of Friday, June 20, upon request. Written requirements in the Request or its amendments are binding, but any oral communications between you and us are not.

Any questions relative to interpretation of the scope of services or the proposal process shall be addressed as indicated above.

BID PREPARATION AND RELATED COSTS

The District reserves the right to request clarification of information submitted and to request additional information from any or all vendors. All costs associated with the presentation of the proposal and any supplemental information shall be borne solely by the vendor and shall not be passed on to the District under any circumstances.

VENDOR RESPONSIBILITY

We expect you to be thoroughly familiar with all specifications and requirements of this Request. Your failure or omission to examine any relevant form, article, site or document will not relieve you from any obligation regarding this Request. If at any time we discover deviations in your reply that are not identified, you may be subject to disqualification from consideration or cancellation of contract.

GENERAL INSTRUCTIONS

Proposals received after the time and date specified, whether delivered or mailed, will not be considered. This responsibility rests entirely with the Vendor, and delays resulting from postal handling or for any other reason will not extend the timeline.

The District reserves the right to reject any or all proposals, to waive any informalities, irregularities or technical defects in proposals, and unless otherwise specified by the District to accept any item or groups of items in the proposal, as may be in the best interest of the District. The District retains the right to qualify or disqualify vendors on the basis of available information pertaining to their service and/or the suitability of the goods and services proposed. No bid shall be accepted from or contracted to any person who is in arrears to the District upon debt through contract or purchase, or who is the defaulter of security or otherwise upon an obligation to the District, or who shall in other respects be disqualified. The vendor to whom the award is made will be notified at the earliest possible date.

The tentative acceptance of the Proposal and award of the contract will be by a notice in writing and mailing to or delivered at the office of the Vendor designated in the Proposal. All prices proposed by the Vendor must be firm for 120 days from the due date of the bid. If, for some reason, agreement with the selected vendor cannot be reached to the satisfaction of the District, negotiations may begin with another vendor within fourteen days after the initial finalist vendor selection.

As the WISD is a public entity, submitted proposals will not be considered confidential and may be requested by and shared with other vendors.

PREPARATION OF PROPOSALS

To facilitate proposal preparation, a copy of this proposal in .PDF and Microsoft Word format may be obtained by request made to the District contact.

If erasures or other changes appear on the proposal forms, each erasure or change must be initialed by the person signing the proposal.

Any documents intended to supplement or deviate from the express requirements of this proposal solicitation may result in a rejection of that proposal. Any forms and contracts the vendor proposes to include as part of any agreement resulting from this Request between the Vendor and the District *must* be submitted as part of the bid. Any forms and contracts not submitted as part of the bid and subsequently presented for inclusion may be rejected by the District. This requirement includes, but is not limited to, the following types of documents: contracts, licensing agreements, maintenance contracts, and system support agreements.

Proposals must be submitted to the Contact on the cover page. All mailing, shipping or delivery of proposals should be addressed to the Contact.

MODIFICATION OR WITHDRAWAL OF PROPOSALS

A proposal that is in the possession of the Contact may be altered by letter or fax transmission bearing the signature or name of the person authorized for proposing, provided it is received **prior** to the time and date of opening. A facsimile should not reveal the proposal price but should indicate the addition, subtraction, or other change in the proposal. A change in the pricing must be received via USPS mailing, package/letter delivery service, or hand delivered.

A proposal that is in the possession of the Contact may be withdrawn by the vendor in person or by written request up to the time of the proposal opening. Proposals may not be withdrawn after the proposal opening.

PERFORMANCE – FORCE MAJEURE

Successful vendors shall be excused from performance hereunder during the time and to the extent vendor is prevented from obtaining, delivering, or performing in the customary manner by acts of God, fire, war, loss or shortage of transportation facilities, lockout or commandeering of raw materials, products, plants, or facilities by the government. Vendor shall provide the District substantiating evidence that non-performance is due to other than fault or negligence on their part.

CONFLICT OF INTEREST

Vendor warrants it has no interest and shall acquire no interest that would directly or indirectly conflict in any manner or degree with the performance of this proposal.

GRATUITIES AND KICKBACKS

It shall be a breach of ethical standards for any person to offer, give or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept or agree to accept from another person a gratuity or an offer of employment in connection with any decisions, approval, disapproval, recommendations, preparation of any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering advice, investigation, auditing or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy or other particular matter, pertaining to any program requirement of a contract or subcontract or to any solicitation or proposal therefore. It shall be a breach of ethical standards for any payment, gratuity or offer of employment to be made by or on behalf of a sub vendor under a contract to the prime vendor or higher tier sub vendor or a person associated therewith, as an inducement for the award of a subcontract or order. Breach of the provisions of this paragraph is, in addition to a breach of this contract, a breach of ethical standards that may result in civil or criminal sanction.

NON-COLLUSION

The vendor and the undersigned certifies that this proposal has not been made or prepared in collusion or cooperation with any other proposing vendor, or representative thereof, and the prices, terms, or conditions of the bid have not been communicated by or on behalf of the vendor to any other proposing vendor or potential vendor and will not be so communicated to any other vendor or potential vendor prior to the official opening of the proposals. This certification may be treated for all purposes as if it were a sworn statement made under oath, subject to the penalties for perjury. Also, it is made subject to the provisions of the USC Title 18, Section 1001, relating to the making of false statements.

FEDERAL DEBARMENT STATUS

Expenditures or contracts involving federal funds are subject to Federal Rules and Regulations. Therefore, when expenditures or contracts are to be paid with federal funds, Federal Regulation 7CFR 3017 regarding Federal debarment status will apply.

For further information regarding 7 CFR 3017 Government wide Debarment and Suspension, refer to 7 CFR 2200.11 and 34 CFR Part 85- Government-wide debarment and suspension (nonprocurement).

INTEGRATION

All Proposal solicitation documents, vendor's response to each solicitation, all correspondence and addenda contain the entire understanding between the parties and any additions or modifications hereto may only be made in writing executed by both parties.

LAWS TO BE OBSERVED

The successful vendor shall keep fully informed on all federal and State of Michigan laws, all local bylaws, regulations and all orders and decrees of bodies or tribunals having any jurisdiction or authority which in any manner affect those engaged or employed on the work or which in any way affect the ordinances, regulations, orders and decrees in force at the time of award. The successful vendor shall protect and indemnify the District and its representatives against any claim or liability arising from or based on the violation of any such law, bylaw, ordinance, regulation, order or decree whether by himself or by his employee(s). No extension of time or additional payment will be made for loss of time or disruption of work caused by any actions against the successful vendor for any of the above reasons.

The parties expressly agree and understand that the provider is not an employee or agent of the District in any sense; rather, the Vendor is a sole independent contractor.

DISCRIMINATION

The District hereby notifies all Vendors it will affirmatively ensure that, in any contract entered into pursuant to this advertisement, minority business enterprises will be afforded full opportunity to submit proposals in response to this request. Vendor hereby agrees that it will comply with all Federal and Michigan laws and regulations prohibiting discrimination, and in accordance therewith, shall not discriminate against any person on the basis of religion, race, color, national origin or ancestry, age, sex, height, weight, familial status, or marital status, exclude from participation in, deny the benefits of, or otherwise subject to discrimination in any program or activity for which it is responsible or for which it receives financial assistance from a U.S. Federal Agency or the Michigan Department of Education. [Michigan Public Act 453 of 1976 (Elliott-Larsen Civil Rights Act)]; [Title VI and Title VII of the Civil Rights Act of 1964 (45 U.S.C. 2000d through 2000d-4); Title IX of the Education Amendments of 1972 (20 U.S.C. 1681-1683); Age Discrimination Act of 1975 (42 U.S.C. 6101 et seq.)]

IMMIGRATION REFORM AND CONTROL ACT OF 1986

By submitting their Proposal, Vendors certify they do not and will not during the performance of this contract employ illegal alien workers or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986.

SUBSTANCE FREE ENVIRONMENT

The use of tobacco, drugs, or alcohol is prohibited in all District buildings, vehicles, and on the grounds of all District facilities.

FREEDOM OF INFORMATION ACT

Information submitted in vendor proposals becomes public information and, as such, is subject to public disclosure and review under the Michigan Freedom of Information Act. Information contained in the vendor's proposal which is company-confidential must be clearly identified in the proposal itself.

RESOLUTION OF DISPUTES

Any issues or provisions of the contract in dispute between the district and the vendor, which, in the

judgment of either party to the contract may materially affect the performance of such party, shall be reduced to writing by both parties and delivered to the Contact. The District and the contractor shall promptly, thereafter, negotiate in good faith and use every reasonable effort to resolve such dispute in a mutually satisfactory manner.

GOVERNING LAW

The laws of the State of Michigan shall govern the validity, construction and effect of this contract and any and all extensions and/or modifications. Michigan law shall govern regardless of any language in any attachment or other document that the vendor may provide.

SEVERABILITY

Should any provision of this contract be declared to be invalid by any court of competent jurisdiction, such provisions shall be severed and shall not affect the validity of the remaining provisions of this contract.

INSURANCE COVERAGE

The vendor, at its expense, must maintain during the terms of any subsequent contract the following minimum levels of insurance coverage:

1. Professional Liability Insurance with minimum limits of \$1 million per occurrence and \$1 million aggregate.
2. Workers' Compensation Insurance which meets Michigan statutory requirements.
3. Comprehensive General Liability Insurance with minimum limits of bodily injury of \$500,000 each person and \$1 million aggregate and with minimum limits for property damage of \$500,000 each occurrence and \$1 million aggregate.
4. Comprehensive Automobile Liability with Michigan no-fault coverage, with minimum limits for bodily injury of \$500,000 each person and \$1 million each accident and with minimum limits for property damage of \$500,000 each accident.
5. Errors and omissions coverage with minimum limits of liability of \$1 million.

If, during the terms of this or any subsequent contract, changed conditions or other pertinent factors, should in the reasonable judgment of the District, render inadequate the insurance limits, the vendor will furnish on demand such additional coverage as may reasonably be required and available under the circumstances. The insurance must be affected under valid and enforceable policies, issued by recognized, responsible insurers which are well-rated by national rating organizations.

Insurance policies must name the vendor as the insured, along with the District as additional insured, and must not be canceled or materially changed without at least 30 days prior written notice from the vendor to the District contact. The vendor must submit a certificate evidencing the insurance to the District at the time the vendor executes the contract, and at least 15 days prior to the expiration dates of expiring policies.

INDEMNIFICATION

The vendor shall indemnify and hold harmless the District, including WISD and each of its constituent

school districts, their officers and employees from all suits, actions, or claims of any character brought because of injuries or damage received or sustained by any person, persons, or property; on account of the operations of the said vendor, its agents, servants, or subcontractors; or on account of or in consequence of any neglect in safeguarding the work.

TERMINATION

Subject to the provision below, the contract may be terminated by the District upon thirty (30) days advance written notice to the other party; but if any work or service hereunder is in progress, but not completed as of the date of termination, then this contract may be extended upon written approval of the District until said work or services are completed and accepted.

Termination for Cause: Termination by the District for cause, default, unsatisfactory performance or negligence on the part of the firm shall be excluded from the foregoing provision; termination costs, if any, shall not apply. The thirty (30) days advanced notice requirement is waived in the event of Termination for Cause. The failure of the successful vendor to comply with the terms and conditions of this proposal will subject this contract to revocation.

Unsatisfactory performance shall be defined as no service, consistent late service or failure to comply with the qualifications, standards, quality of work as was presented in the response to this Request for Proposal.

CERTIFICATION AND COMPLIANCE

The undersigned agrees to furnish the commodity and/or services stipulated in the attached Request, at the prices and terms stated, subject to the general conditions outlined and the specific conditions identified. If more than one company is involved in providing this solution and certifying its compliance with this Request, all companies should sign the certification below.

A signed contract furnished to the successful vendor results in a binding contract without further action by either party. The contents of your response to this Request for Proposal will become part of the final contract between the parties.

BID SPECIFICATIONS

Washtenaw Intermediate School District (WISD) is requesting proposals for fundraising consultancy on behalf of My Future Fund (MFF), a Washtenaw County children's savings account initiative.

Proposals may be submitted for one or more phases of the project. For proposals submitted for multiple phases, costs should be provided by phase.

Please separate all costs/charges for the product you are proposing; for example, staffing, training, equipment usage (if housed offsite), etc. Please provide staffing qualifications and indicate whether or NOT your services meet or exceed the requested specifications.

Questions with regard to the RFP are to be directed to the contact on the cover page in writing by email. Questions and answers will be available upon request after the June 6, 2025, deadline and through the June 20 proposal deadline upon request. One hard copy with original signatures is requested. Proposals

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must arrive at the location specified on the RFP cover sheet, and by the bid opening date and time, to be considered. No proposal received after the proposal opening will be considered. No facsimile proposals shall be accepted.

Vendor acknowledges that the District shall select those proposals by item that it considers to be in their best interest. District reserves the right to (1) award a proposal by line item, (2) accept or reject a proposal in whole or in part, and (3) qualify or disqualify vendors on the basis of available information pertaining to the suitability of the goods proposed.

Authorized Signature of Company Representative

Company Name

Printed Name & Title of Representative

Authorized Signature of Company Representative

Company Name

Printed Name & Title of Representative

II. Background

The WISD launched the My Future Fund (MFF) program in collaboration with Washtenaw County government in 2023, having begun the process of initial design work in 2021. Washtenaw County government has provided a generous initial investment of \$6.7 million over 4 years to build My Future Fund's programmatic foundation and seed the deposits for over 25,000 by the end of the 2025-26 school year. Over the last 2.5 years, staff and stakeholders have built the program infrastructure, enrolled over 21,000 students, invested almost \$1.8 million in students' futures and developed relationships with numerous school and community partners.

The My Future Fund program has made a commitment to current and future participants in Washtenaw County by establishing accounts for their futures into perpetuity. Annual deposits for students starting in 2026-2027 are expected to be \$973,000, if retaining the \$25 seed deposit and \$475 equity deposit. This figure does not include any additional incentives for students and families. Programs with similar goals, such as St. Paul, have committed to the development of an endowment and project needing to raise upwards of \$25 million to ensure that this endowment is capable of sustaining both deposits and operational expense for the long-term. MFF has similar goals and needs and projects it will require a short-term strategy to support continuity of services while developing a long-term strategy, such as an endowment, of closer to \$30 million to achieve this. To support the large scope of the program, the County and WISD must begin planning sustainability both to support the current cohorts of students and to continue to offer the program to future cohorts of students.

A children's savings account program is a long-term investment in a community's students. The recent findings from San Francisco's Kindergarten to College (K2C) program show the positive impact of this early investment in students. With a 6% increase in enrollment in post-secondary education for recent graduates, K2C can serve as a model for CSA support throughout a student's education. Furthermore, this data suggests that My Future Fund can support Michigan's larger Sixty by 30 goals of increasing higher education attainment in the state.

In addition, K2C found a 12% increase in post-secondary enrollment by students from underrepresented groups. One of the aims of the My Future Fund program is to support students from underrepresented groups and one way the program does this is through the \$475 bonus deposit for low-income students. This is the largest progressive deposit being offered to students in Michigan CSA programs and could serve as an example to the field.

In Washtenaw County low-income students enrolled in post-secondary options at a lower rate than their more advantaged peers. According to MI School Data, for Washtenaw County's class of 2021, 73% of students overall enrolled in a post-secondary option the following year. But only 52% of low-income students continued their education in the following year. The early data from K2C indicates that My Future Fund could have a similar positive impact on our local underrepresented students. By building a sustainability plan, we can ensure that we can offer funding and support to current and future students in pursuit of moving the needle on post-secondary enrollment for low-income students.

WISD is seeking a consultant to aid in the development of a sustainability plan to support MFF's operational expenses as well as student deposits and incentives well into the future. Sustainability planning will occur across three different phases of planning and a consultant or team of consultants is needed to move WISD and its partners through each phase to achieve this long-term objective. The

desired timeline for completing proposed deliverables is August 1, 2025, through February 28, 2026. Although an extended timeline may be considered, all work must be concluded no later than June 30, 2026.

III. Required Contents of Vendor Proposals

The proposal must include the following categories of information and provide the specific information as identified below.

1. Introduction – Describe the composition of the team assigned to the project and how this will contribute to the successful project completion. Explain the firm/team’s unique qualifications.

2. Project Objectives - Identify which phase(s) you are including in your proposal. A description of each phase and required deliverables are included below. Clearly summarize the approach that will be used and how the scope of work will be performed. Identify any specific challenges associated with the project and how these challenges will be addressed. Summarize the methodology that will be used and how the process was successfully utilized on similar projects. Outline anticipated work plan, timeline, techniques to be employed, and artifacts to be produced to demonstrate completion.

Phase 1 Objectives: Completion of fund development readiness assessment

The Phase 1 objective is to conduct a study assessing the readiness of the primary partners (WISD and Washtenaw County Government) for readiness to engage in a fundraising campaign. Vendors should prepare and submit a report that includes, at minimum:

- An assessment of existing infrastructure, staff capacity, and relationships.
- An assessment of real and perceived strengths and weaknesses in fundraising.
- Identification of critical need and gap areas in fundraising.
- Recommendations to strengthen fundraising position.

Phase 2 Objectives: Completion of campaign feasibility

The Phase 2 objective focuses on the feasibility of raising sustainability funds to support the long-term functions of the MFF program, including funds for student deposits, incentives, and operational expense. Vendors should plan to submit a report that includes, at minimum:

- A recommendation of the amount of money that can reasonably be raised for MFF in Washtenaw County.
- A recommended fund development strategy based on capacity and development goals.
- An assessment of key messaging that resonates with potential donors.
- Identification of potential leaders in fundraising efforts.
- Delineation of roles and responsibilities of board members and staff in recommended development strategy.

Phase 3 Objectives: Develop customized fund development approach

Vendors bidding on Phase 3 work will build on the recommendations from Phase 2 to complete the following deliverables:

- A completed Case for Support.

- A targeted list of potential donors that would meet/exceed fund raising goal.

3. Statement of Qualifications/Team Description and Relevant Professional Experience – Provide names and educational background of each team member including any professional registrations. Describe experience and proposed role for each team member and furnish a project team organization chart. The Team project manager shall be clearly identified. Team members described must be only those assigned to work on the project.

4. Project Experience – List comparable projects in which team members were involved in chronological order. Indicate who from the team was involved with each project and their role and show whether the project was completed by the firm or by team member when employed in another firm.

5. Commitment to Equity – Provide details outlining your firm’s commitment to equity, inclusion, and social justice; include any mission or value statements, training offerings, or other similar evidence.

6. Pricing – Provide the proposed pricing for the project, by phase, clearly indicating what is included and anything that is excluded or that will drive incremental costs. See “Terms and Conditions” for specific pricing details.

7. References – Include with your proposal 3-5 references for similar projects that were done by your company for educational facilities, higher education, or public institutions. List the reference’s company name, contact name, title, address, email address and telephone number as well as a brief project description and approximate date of services.

8. Provide any other relevant information that may be useful to evaluate this proposal.

Disclaimer

This RFP is not an offer to enter into an agreement with any Vendor; it is a request to receive proposals from Vendors interested in providing a service to the District. The District reserves the right to reject all proposals, in whole or in part, and/or enter into discussions with any party to provide such services. The District will not have any obligation to a Vendor unless and until it has entered into a written agreement with the Vendor on terms and conditions satisfactory to the District. The District entering into negotiations with a Vendor with respect to any proposal or otherwise shall not be deemed to be an acceptance of such proposal or an agreement with the Vendor.

Terms and Conditions

Proposal pricing is to include the following;

1. Total number of hours/days/weeks of service
2. Staffing costs, including rates of pay and fringe benefits, if applicable
3. Subcontractor costs, if applicable
4. Materials and supplies
5. Other
6. Indirect costs and rate

Project Scope and Timeline - The proposed timeline for completion of all deliverables is August 1, 2025-February 28, 2026. Timeline may be flexible but should not exceed June 30, 2026.

Disclosures

Proposal must include a sworn and notarized statement disclosing “any familial relationship that exists between” the bidder and any member of the school’s Board of Education (see attached “Affidavit of Bidder”).

Similarly, each proposal must provide confirmation that the vendor is not an Iran-linked business using the attached “Iran Economic Sanctions Act” form. Forms must be notarized.

No proposals will be accepted without these sworn and notarized statements.

IRAN ECONOMIC SANCTIONS ACT

The undersigned, the owner or authorized officer of _____ (the "Bidder"), pursuant to the Iran Economic Sanctions Act (MCL 129.313), hereby represents and warrants that it is not an "Iran linked business".

BIDDER: _____

By: _____

Its: _____

STATE OF MICHIGAN)
) ss.
COUNTY OF _____)

The instrument was acknowledged before me on the _____ day of _____, 20____, by _____.

Notary Public
County, Michigan

My Commission Expires: _____

Acting in the County of: _____

Bid Clarification

Labor (Prevailing Wage)

Note: Michigan Prevailing Wage Law applies to these projects. All construction work shall be performed by Contractors using Union or Non-Union Labor as long as local Prevailing Wage Rates are applied to all work that is performed. Updated wage rates are available from the State of Michigan Department of Labor and Economic Growth.

The Contractor may be asked to provide a Certified Payroll Statement along with a current Prevailing Wage publication to the owner to verify that Prevailing Wages are being paid.