

# South Bay Cities Council of Governments

September 10, 2018

TO: SBCCOG Steering Committee

FROM: Jacki Bacharach, SBCCOG Executive Director

SUBJECT: Consultant needed for raising funds for 2019 General Assembly

## Adherence to Strategic Plan:

*Goal D: Organizational Stability.* Be a high performing organization with a clear path to long-term financial health, staffing continuity, and sustained board commitment.

## **BACKGROUND**

In the past, the SBCCOG has contracted the fundraising function for some of our General Assemblies. In other years and most recently, it has been inhouse. Due to recent staff reductions, the SBCCOG currently does not have the capacity to increase our sponsors and ensure that the sponsors are given the attention that they will need before, during and after the 2019 General Assembly.

In order to fulfill this need, staff solicited 3 proposals from known fundraising professionals in the South Bay. Kim Fuentes and Marilyn Lyon conducted the interviews with all 3 firms. The proposals ranged from \$12,000 to \$15,000 plus commission. The proposers were from: Mary Kay Lundberg (\$12,000), Link2 Events (Lisa Rodriguez) (\$12,000), and Colure & Diamond (\$15,000 plus commission).

## **ANALYSIS**

After review of proposals and interviews with contractors, SBCCOG staff is recommending Mary Kay Lundberg. Her proposal is comprehensive as well as competitive and best matched the needs of the SBCCOG for the event. She brings with her a good understanding of private business values and needs which Staff believes will increase our sponsorship base. In addition, she has a South Bay network of over 1000 plus contacts.

## **RECOMMENDATION**

Based on the skill set needed for this position, staff is recommending Mary Kay Lundberg at a rate of \$30 per hour, not to exceed \$12,000 for a period of October 1, 2018 through March 15, 2019.

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## Scope of Work

### 2019 SOUTH BAY CITIES COUNCIL OF GOVERNMENTS - GENERAL ASSEMBLY SPONSORSHIPS

#### 1. Project Overview

Generate financial sponsorships for the South Bay Cities Council of Governments 20th Annual General Assembly on Thursday, February 28, 2019 in Carson, California. The goal is to secure past sponsors and generate additional sponsorships from local, regional, and national industries with businesses present in and out of the South Bay.

#### 2. Contractor Responsibilities

The sponsorships feature four levels of involvement, benefits, and fees. Acting as the liaison between the sponsor and SBCCOG, the Contractor will secure written sponsorship commitments and fees. In addition, the Contractor will ensure the benefits are fulfilled as stated by the sponsorship documentation.

The Contractor will also process all follow-up and coordination for implementation of the sponsorship agreement which includes securing sponsor-approved artwork and copy for use on all communication platforms; and coordination with relevant vendors if needed such as sign manufacturer.

#### 3. High-Level Requirements

Act as a representative of SBCCOG and follow their code of conduct. Contractor will work with SBCCOG staff and existing resources as follows:

- Access and utilize information on past sponsors and any leads available through SBCCOG, including information on community and Chamber of Commerce events.
- Access and utilize SBCCOG email address, e.g. [marykay@southbaycities.org](mailto:marykay@southbaycities.org) and business cards, if needed.
- Coordinate with SBCCOG on leads and sponsorship benefits and answers to other questions that may arise. (Referrals to Marilyn Lyon and Cierra Washington)
- Utilize SBCCOG forms for Sponsorship commitments and of any documentation required for the Sponsorship program.
- Coordinate on critical due dates and meet deadlines.

#### 4. Deliverables

1. Review SBCCOG solicitation materials and make recommendations. Solicitation methods and materials must be approved in advance by the SBCCOG.
2. Develop nurture tools and implementation calendar; Establish what is the goal at each nurturing stage.
3. Develop leads, contacts, nurture, and close sponsorship deals with the past sponsors for the 2018 General Assembly being the starting point and seek additional sponsors at every level. Weekly status reports via email, in person, or by conference call to SBCCOG staff.
4. Obtain Sponsorship Commitments.
5. Manage sponsorship approvals for artwork and copy for printed and online materials. Includes editing and writing. Does not include creating artwork.
6. Provide Sponsors with suggestions to enhance their benefits, from copy suggestions including the theme of the event to awareness of relevant community leaders attending the event.
7. If needed, manage Sponsors and due dates for artwork and copy for printed materials.
8. Attend General Assembly and welcome Sponsors.

9. Follow-up thank you letters to sponsor, reviewing ongoing benefits, and setting the tone for participation in the 2020 General Assembly.

## 5. Implementation Plan

1. Review information on previous sponsors, leads, and Chamber of Commerce contacts gathered from SBCCOG staff. Contractor will also review their own existing connections in South Bay network (over 1000+ LinkedIn contacts).
2. Track progress on a spreadsheet.
3. Provide weekly status reports to SBCCOG staff.
4. Confirm commitments.
5. Follow-through with above deliverables.

## 6. Timeline/Schedule

Additional dates will be added as critical due dates are known.

October 1, 2018 – January 15, 2019 Solicit, secure, and finalize sponsorships

January 15, 2019 – February 28, 2019 Prep Benefits and Attend General Assembly

February 28, 2019 – March 31, 2019 Follow-up with Sponsors with thank you notes and certificates (supplied by SBCCOG)

## 7. Fees/Payment

Fees for services are \$30.00 per hour with a not to exceed amount of \$12,000. Invoices with progress reports to be submitted no more frequently than monthly.

Specific Exclusions from Scope: Artwork will not be created or produced by Mary Kay Lundberg.

Payment due to Mary Kay Lundberg, 27558 Eastvale Road, Palos Verdes Penn, CA 90274

## 8. Term

Services shall commence on October 1 through March 15, 2019