Request for Proposals (RFP) for 1099 Fractional Development & Capacity-Building Partner (REVISED TIMELINE & SELECTION PROCESS & PHASED YR ONE DELIVERABLES)

The Ridge Macon County Archaeology Project [Ridge Project] is requesting proposals for a 1099 Fractional Development & Capacity-Building Partner to provide combined fundraising strategy and hands-on execution. The Ridge Project has secured a substantial grant to support this contract position during a three-year planning, programming, and capacity building project. The selected Partner will operate on a 12 month contract with option for renewal contingent on satisfactory performance and successful negotiation of Year Two responsibilities, deliverables, and project timeline. Year one budget for position is $30,000 (~$2,500/month) with opportunity for increases in Years Two and Three if contract is renewed.

During year one, the selected Development and Capacity-Building Partner will act as an integrated engine for the organization—building fundraising infrastructure from the ground up, managing localized grant pipelines, and ghostwriting donor campaigns. The Partner will report exclusively to the incoming full-time Executive Director, while collaborating strategically with the Director of Organizational Development (DOD) and the Board of Directors. Proposals from firms and individuals will be accepted.

ABOUT US

Founded in 2011, the Ridge Project operates an Interpretive Center and archaeological dig site located on County Road 10 in rural Warrior Stand, Macon County, Alabama, located about twelve miles south of Tuskegee, Alabama. The Interpretive Center is the first in Alabama to anchor the Federal Road as an "Alabama Fever" historical, social, and cultural landmark. The Center fronts the paved over roadbed of the historic Federal Road on land that Yargee, son of Big Warrior, a Principal Chief of the Muscogee Creek Nation, acquired in an 1835 land patent.

The Ridge Project's mission is to foreground the complex stories of how the Federal Road facilitated human migrations to Alabama during U.S. westward expansion in the 1800s and the effects of expansion on the people of the region. We present place-based educational history, culture, and archaeology programs, exhibits, publications, and events to visitors of all ages and backgrounds that focus on Muscogee Creek peoples and their ancestors from pre-historic times to Removal, white settlers and enslaved African Americans who migrated during the Alabama Fever land rush from the early to mid-1800s, and post-Civil War local, state, and regional evolutions up to the mid-twentieth century. Our programs and events promote critical thinking, foster social cohesion, and promote understanding of how migration and settlement have shaped the U.S. over time.

YEAR ONE CORE RESPONSIBILITIES

Rather than acting solely as an advisor, the Partner is responsible for both the planning and the administrative execution of the following tracks:

- Data & Infrastructure Migration: Select, configure, and migrate the Museum's historical donor data from legacy spreadsheets into a permanent, cloud-based nonprofit CRM.
- Grant Lifecycle Management: Identify, calendar, draft, and package a minimum of two (2) grant proposals per quarter targeting Alabama-specific and regional funders.
- Donor Campaign Execution: Design and execute a comprehensive year-end and/or spring individual donor appeal. The Partner will handle prospect segmenting, list cleaning, and letter/email writing.

- Corporate Sponsorship Packaging: Build a structured corporate/small-business sponsorship matrix with clear benefit tiers, and draft customized outreach packets for local & regional businesses.
- Behind-the-Scenes Coordination: Act as a "ghostwriter and strategist" for Ridge Project leadership. The Partner will draft the scripts, talking points, and emails, enabling the Executive Director and DOD to seamlessly execute face-to-face donor cultivation meetings.

PHASED YEAR ONE DELIVERABLES

To ensure maximum accountability within the $30,000 Year One budget (~$2,500/month), the contract will be bound to the following phased deliverables:

Phase 1: Infrastructure & Data Onboarding (Months 1–2 Dec. 2026 & Jan. 2027/Month one; Qtr. 1 2027)

- CRM Selection & Setup: Evaluate and select a low-cost, nonprofit-specific CRM optimized for a small donor base.
- Data Migration: Clean, format, and migrate 100% of legacy spreadsheet donor records into the new CRM system under an account owned exclusively by the Ridge Project.
- Master Case for Support: Draft a comprehensive "Master Narrative" document detailing the Ridge Project's history, mission and vision, its intersections with Alabama and U.S. history and culture, its local and regional impact, and summarizing Ridge Project operational and/or programmatic goals that align with funding priorities of viable grantors for example, operations, strategic planning, capacity-building, the humanities, and arts and culture. This will serve as a source text for all Year 1 grants.
- Grant Calendar Baseline: Deliver a 12-month grant tracking calendar featuring at least 15 qualified regional opportunities, noting grantor funding priorities, grant cycles, and proposal due dates.

Phase 2: Grant Launch & Corporate Packaging (Months 3–4 Feb.-Mar./Qtr. 1 2027)

- Submission Pipeline: Prepare and submit the first two targeted grant proposals.
- Corporate Sponsorship Matrix: Create a finalized, professional sponsorship packet targeting local and regional business owners.
- Prospect Identification: Build a targeted pipeline profile of at least 20 qualified major donor prospects within the new CRM.

Phase 3: Individual Giving & Local Cultivation (Months 4–9 Apr.- Sept./Qtr. 2 & Qtr. 3 2027)

- Submission Pipeline: Prepare and submit four targeted grant proposals (minimum 2 per quarter).
- Individual Appeal Campaign: Design, write, and segment a multi-channel individual donor campaign (direct mail + email templates) aiming to re-engage past supporters and acquire new donors.
- Cultivation Kits: Provide the Executive Director and Board with customized "Meeting Toolkits" (agendas, talking points, ask amounts, and follow-up email drafts) for at least two localized major donor or agency meetings.

Phase 4: Evaluation & Year 2 Planning (Months 10–12 Oct.-Nov./Qtr. 4 2027)

- Submission Pipeline: Prepare and submit the final two or more targeted grant proposals for the fiscal year (minimum 2 per quarter).
- Campaign Execution Support: Manage the data entry, tracking, and personalized acknowledgment/thank-you letter generation for all responses to the individual appeal.
- Develop and execute a 2027 year-end giving campaign
- Annual Progress Evaluation: Deliver a comprehensive year-end fundraising report pulled directly from the CRM, assessing conversion rates, total funds raised, and CRM data health.

- Year 2 Roadmap: Deliver a revised strategic plan for Year 2, outlining the timeline for introducing advanced goals (such as "Friends of the Ridge Project" membership scaling and initial earned-income pilots)

PROPOSAL EVALUATION & SELECTION CRITERIA

A. Evaluation Methodology

The Ridge Project will evaluate all conforming proposals using a 100-point matrix. This process is designed to identify the Prospect who offers the best blend of hands-on administrative execution and practical, localized fundraising strategy. High-level, purely advisory proposals that lack clear "boots on the ground" execution workflows will be disqualified.

B. Scoring Matrix (100 Total Points)

1. Proven Execution & Tactical Capability (30 Points)
    - CRM & Data Migration Experience (15 pts): Demonstrated track record of migrating small nonprofits out of spreadsheets and into entry-level CRMs. Prospect must prove they can execute data cleaning and system setup themselves, without requiring the Ridge Project to hire a third-party IT contractor.
    - Campaign and Copywriting Mechanics (15 pts): Evidence of high-quality, persuasive writing. The Prospect must demonstrate the ability to independently write grant proposals, corporate sponsorship packets, and direct-response donor appeal letters from scratch.
2. Localized & Regional Funding Familiarity (25 Points)
    - Alabama/Black Belt Landscapes (15 pts): Deep familiarity with the Alabama philanthropic landscape, corporate foundations, and regional community/state funders.
    - Rural Fundraising Realities (10 pts): Clear understanding of the economic realities, historical context, and relationship-driven nature of fundraising in rural, low-wealth, or Black Belt counties.
3. Strategic Fit & Leadership Transition Navigation (20 Points)
    - The "Ghostwriter" Model Approach (10 pts): Commitment to working behind the scenes to equip, script, and empower the incoming Executive Director and DOD.
    - Transition Sensitivity (10 pts): Experience working with organizations navigating founder/volunteer-to-paid-staff transitions, ensuring billable hours are spent on execution.
4. Cost Effectiveness, Scope Alignment, & Multi-Year Feasibility (15 Points)
    - Budget Alignment: Explicit acceptance of the fixed, grant-funded budget caps ($30K Year 1; $32K Year 2; $34K Year 3).
    - Hour/Capacity Realism: provides a realistic, transparent breakdown of monthly hours or capacity that proves they can execute the Year 1 deliverables (CRM migration + 8 grant applications + 1 major individual campaign) without exceeding the fixed monthly retainer.
5. References & Case Studies (10 Points)
    - Proven success metrics from at least two (2) past or current clients of similar budgetary scale (annual operating budgets under $250,000) showing measurable growth in donor retention or grant acquisition.

REQUIRED PROPOSAL SUBMISSION QUESTIONS

To ensure candidates are properly screened, all Prospects must submit written responses to the following case-study questions within their proposal:

1. The CRM Migration Case: *"We currently track our tiny donor base entirely on disjointed Excel spreadsheets and have no software. Describe a time you personally migrated a client from*

spreadsheets to a formal CRM. Which low-cost CRM did you select, how did you handle the data cleaning, and what was your workflow to ensure the client's team learned how to use it?"

2. The "Boots on the Ground" Workflow: *"Our year-one budget allows for roughly $2,500/month. Explain how you will balance high-level grant strategy with the administrative execution of writing 2 grants per quarter, cleaning mailing lists, and ghostwriting appeal letters. What does your weekly or monthly execution workflow look like to ensure goals are met within this budget cap?"*
3. The Rural Narrative Challenge: *"Macon County is a culturally rich but economically under-resourced rural area. How do you tailor a 'Case for Support' and direct mail appeal language when targeting donors and regional corporations for an institution located in a rural Black Belt community versus an urban center?"*

REQUIRED SUBMISSION CHECKLIST

To be considered for review, proposals must be submitted as a single, combined PDF document. Prospects must include all items listed below. Incomplete submissions that omit required writing samples or case studies will be disqualified without review.

1. Cover Letter & Executive Summary
    - A brief overview of your firm or independent consulting practice.
    - An explicit statement confirming your availability and commitment to the first year project timeline and year-one fixed cap of $30,000.
    - Acknowledgement of year to year contract status and Year Two contract renewal opportunity contingent on satisfactory performance, successful negotiation of Year Two responsibilities, deliverables, and timelines, and acceptance of Year Two fixed cap of $32,000.
2. Narrative Responses to Screening Questions
    - Written responses to the three (3) required case-study questions outlined in the Appendix (*The CRM Migration Case*, *The "Boots on the Ground" Workflow*, and *The Rural Narrative Challenge*).
3. Technical Approach & Work Plan (Year 1)
    - A detailed description of your workflow to accomplish the Phase 1 through Phase 4 milestones.
    - A realistic projection of your monthly time or capacity allocation (e.g., hours per month or dedicated days per week) to demonstrate how the extensive scope will be managed within the $2,500/month Year 1 budget.
4. Core Execution Portfolio (Writing & Data Samples)

    Note: Proprietary or sensitive donor names/funder information may be redacted.
    - Sample A: Grant Writing. One (1) full or heavily excerpted grant proposal successfully submitted to an Alabama-based foundation or regional funder that resulted in funding.
    - Sample B: Individual Donor Appeal. One (1) sample of a direct mail letter or multi-channel email appeal campaign written by the applicant.
    - Sample C: Infrastructure Proof. A brief narrative description or visual outline (like an anonymized data-mapping spreadsheet) illustrating how you clean and structure legacy donor data prior to a CRM import.
5. Cost Proposal & Professional Fee Structure
    - A clear statement of the proposed flat monthly retainer for Year 1, Year 2, and Year 3.
    - An explicit confirmation that the flat retainer includes all labor, administrative overhead, and travel expenses required for any agreed-upon on-site meetings in Macon County.

6. Qualifications, Resumes, and References
    - Resumes of the specific individual(s) who will be executing the daily work. (If a multi-person firm applies, the resume of the junior or mid-level staffer assigned to the daily execution must be included).
    - Contact information for three (3) professional references, ideally including at least one small or rural nonprofit client with an annual operating budget under $250,000.

TIMELINE & SELECTION PROCESS

The Ridge Project will adhere to the following schedule for RFP distribution, review, and for the selection of the 1099 Fractional Development & Capacity-Building Partner. The Ridge Project reserves the right to modify this schedule if necessary, with notification provided to all registered applicants.

RFP Release Date	October 6, 2026 October 12-13, 2026	Official publication of the RFP on Ridge Project website. Announced in Ridge Project e-newsletter & published on Alabama Association of Nonprofits Jobs Board
Deadline for Written Questions from Prospects	October 19, 2026	Prospects having questions regarding the scope or budget should email Dr. Shari L. Williams by 5:00 p.m. CST at contact@digtheridge.com
Responses to Prospect Questions Issued	October 22, 2027	The Ridge Project will email an Addendum responding to all compiled questions to ensure transparency for all Prospects.
PROPOSAL SUBMISSION DEADLINE	**November 10, 2026**	**All proposals must be submitted electronically as a single, combined PDF by 5:00 PM CST via email to Dr. Shari L. Williams, at contact@digtheridge.com with the subject line: "RFP Submission: Fractional Development Partner - [Applicant/Firm Name]"**
Initial Review & Shortlisting	November 11-13, 2026	The Selection Committee evaluates submissions against the 100-point matrix to select the top 2–3 candidates.
Candidate Interviews	November 16-18, 2026	45-minute virtual interviews featuring a brief presentation of the candidate's Year 1 CRM migration plan.
Reference & Background Checks	November 19-20, & Nov. 30 2026	Committee contacts provided professional references, prioritizing past small budget/rural nonprofit clients.
Contract Award & Notification	December 1-4, 2026	The selected Partner is notified, and contract negotiations are finalized.
Official Project Start Date	December 7, 2026	Partner begins Phase 1 (CRM Selection & Data Onboarding).