

Request for Proposals – January 2015

Branding, Identify & Key Messaging Program - Fresno Regional Foundation

y S a u mm r

The Fresno Regional Foundation (FRF) is looking for services to conduct a brand review/development program to assist its efforts to define a broader and more engaging visual/marketing/web brand to support its current and prospective work. Based in Fresno, California, FRF is a respected community foundation who has been accredited in compliance with national standards for US Community Foundations by the Council on Foundation. It serves donors and communities in six counties across the central San Joaquin Valley in California; the six counties are Merced, Madera, Mariposa, Kings, Tulare and Fresno.

g a c o d k ru n

Celebrating fifty years of service to the region in 2016, the foundation is embarking on a more deliberate asset development strategy and is seeking assistance in reconciling the following elements of its brand:

- the unique power of a community foundation to engage in the work of building community through engagement of donors, funders, public and nonprofit agencies and the wider community
- serve as a model of nonprofit governance and leadership, reflected in the best practices embodied in national standards and a commitment to integrity, transparency and effectiveness
- measuring the impact of its work (and communicate through our brand) through
 - its annual donor directed and competitive grantmaking , which includes priority areas such as
 - reducing teen pregnancy
 - helping families with children 0-8 succeed
 - environmental and smart growth strategies
 - arts and culture
 - youth and scholarship programs
 - human services and nonprofit capacity building
 - veterans
 - its investment returns over time for managed endowments as evidence of good stewardship and smart investment strategies
 - an expanded community space to engage donors and nonprofits
 - its power to convene groups to combat issues important to the community
 - donor services platform to help current and prospective donors make more effective grants and develop meaningful philanthropic strategies that reflect values important to donors and their families
 - exploring multigenerational strategies that address complex community issues and engage across family generations
 - its investment in nonprofit leadership capacity building

- its planned giving pipeline and assistance to local nonprofits through cost efficient and innovative products like a charitable gift annuity
 - developing a new generation of donors through its NextGen committee
- the strength of funding partnerships from statewide, regional and national funders who partner with FRF to invest in programs that serve the Valley's residents and invest in expanding opportunity
- engagement with other regional organizations and partners on issues such as workforce development, community stewardship and drought challenges.

the future of the foundation

The brand definition will likely include a new name that reflects a wider footprint and is more inclusive of the six county region (working title: Community Foundation San Joaquin Valley) to eliminate the barriers than using "Fresno" currently presents to some. A more proactive regional strategy is being developed. FRF is expected to remain anchored in Fresno but have a more visible and engaging presence in the region, to be built on donor service, grant making, nonprofit capacity building, research and regional expertise, partnership with regional, statewide and national funders, and a deeper level of engagement with key stakeholders. Key stakeholders include financial and legal intermediaries, nonprofit board and staff leaders, community partners, public and local official and region wide intermediaries and collaborative partners such as First 5, the United Way, etc. An outline of this strategy is expected by late winter 2015

Assess the foundation's growth

With the hiring of a new president & CEO in the fall of 2014, the foundation is poised to enter a period of sustained and significant growth, strategies for which will be embedded in a strategic plan likely to be completed in the summer of 2015. Parameters for the growth are tied to the following core assumptions:

the future of the Central San Joaquin valley is grounded in investing in people skills, organizations and sectors that can work together to address complex problems; many of the resources needed to shape solutions are already here

families and donors with substantial resources which could be harnessed to local philanthropic impact may not believe that FRF is capable of helping them or even be aware of its existence

the region will be better served by having a strong foundation that has at its core a long term business model serving and supporting these six counties that can be served effectively without losing local autonomy and visibility

donors care about their local communities and are looking for ways to be more effective in their giving and more engaged in their community; this is not inconsistent with a strong foundation platform that can serve multiple counties

investment expertise is a key element of building trust; so too is regional knowledge as to local nonprofits, community needs and effective grantmaking.

Equally important in building donor trust is the ability to share (with ease of access) the impact of effective grantmaking from funds entrusted to the foundation's care donors have alternatives to a community foundation (Fidelity, Vanguard, major financial institutions, etc.); the unique value and contributions of a community foundation to a donor's philanthropy must be articulated clearly the community foundation's extensive experience in competitive grantmaking builds credibility as an effective and knowledgeable grantmaker, particularly around the priority areas defined.

partnerships and collaborations will be needed for effective change; so too will a vision for the future that is inclusive of the region's broad diversity and history a community foundation must have earned the trust to be given unrestricted funds for future grantmaking, underscoring its long term commitment to the region's health, wellbeing and prosperity; this remains at the heart of the case for The FUND for San Joaquin Valley, a permanent endowment distributing annually to address the compelling and changing needs for our region.

A brand for the community foundation will enable and assist staff and board to communicate the foundation's mission, impact and potential for positive change, and its commitment to engage with those who want to shape the future of the region through philanthropy.

FRF the effective social health brand

The particulars (name, logo, tag line, visual imagery, consistent language) will come from the core identity of the brand itself:

- local in focus and mission – the CF is about place, and this place (San Joaquin Valley) in particular
- invested in engaging community through convening, meeting, research and expertise, delivered in part through dedicated public meeting spaces and access to best practices
- skilled staff, experienced and able to help donors and nonprofits strengthen charitable capital effectiveness
- committed to nonprofit leadership success through training, investment and best practices
- dedicated to understanding problems with research, facts and direct experience
- bias toward collaboration, partnership and cooperation and the power of leverage
- ongoing evaluation is a critical tool to define progress and success
- long term view, with a priority on next generation leadership and skill building
- passionate advocates for effective storytelling
- mission, results and stories all accessible through modern technology platforms
- tied irrevocably to expanding economic opportunity for regional success
- hopeful about the region's future and determined to help shape it

x t v e d e e a p e i l r bl

Brand definition
Key Messaging elements
Updated name
Updated logo
Updated tagline
Logo & Tag line usage guidelines

A marketing plan, rollout and marketing strategies will be considered separately, once the approval of the brand definitions and updated messaging has been secured. Materials will need to include business cards, letterhead and document templates, printed materials, newsletters, web site, office signage, banners and speakers materials, email and online communication, and other related materials.

_____ **gt d e u**

FRF has funds budgeted to complete both the brand and marketing rollout strategies in CY 2015. Budget allocations will reflect the scope and experience of the consultant and project deliverables.

_____ **T g i i m n**

The project is projected to start in mid- January and preliminary results due by mid- March. Please submit proposal, highlighting:

experience in branding for philanthropic and/or grantmaking institutions. Please note any community foundation experience.
proposed timeline and process for developing new brand materials, identity and possible outreach
proposed process in working with staff, board and community
experience and expertise in central San Joaquin Valley issues, organizations and/or communities
sensitivity to working across diverse communities to develop brand awareness and messaging
proposed price structure, contingencies and project parameters.

Preliminary proposals may be reviewed prior to the submission date. Please contact Hugh Ralston, President & CEO at hugh@fresnorefoundation.org for more details. Submission date for consideration will be January 20th. Paper copies preferred.

Fresno Regional Foundation

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