

ISSUED BY

Black Cultural Zone CDC

Carolyn Johnson, CEO

info@blackculturalzone.org

www.blackculturalzone.org

REQUEST FOR PROPOSAL

Issued: Spring 2026
Deadline: Rolling Review

RE: Major Gifts & Private Wealth Subject Matter Expert (SME)

1. PROJECT OVERVIEW

The **Centers of Excellence Network Foundation** is seeking an elite **Major Gifts & Private Wealth Subject Matter Expert (SME)** to join our **Strategic Collaboration Ecosystem**. This role supports the **Black Cultural Zone CDC** (our operational Strategic Management Services hub) and our broader network of programmatic corporations in securing transformational capital to scale a **\$2.0B+** community-led ecosystem.

The Foundation serves as the **System Architect**, providing strategic oversight and fiduciary control, while the **Black Cultural Zone CDC** serves as the operational backbone, providing standardized shared services to subsidiaries focused on Real Estate, Culture, Land Stewardship, and Economic Empowerment.

2. THE STRATEGY: "SIRE"

We are moving from reactive fundraising to **Strategic Institutionalization and Resource Expansion (SIRE)**. We require an SME who can navigate the "Quiet Rooms" of private wealth and family offices to secure permanent community sovereignty through transformational investment and fiduciary rigor.

3. SCOPE OF WORK

AREA OF FOCUS	DESCRIPTION
WEALTH INTELLIGENCE	Utilize iWave and Momentum to identify HNWIs, Family Offices, and DAF holders within our 6-year history.
INVITATIONAL	Target "Closed" funding circles and private wealth networks to secure Private Invitations to Apply and facilitate warm CEO introductions.
ROADMAPPING	Design and execute unique journeys for transformational donors (\$100k+), moving them from discovery to a formal "Private Ask."
INTELLIGENCE	Provide the CEO with "Strategic Intelligence Briefs" before major encounters, equipped with data-backed talking points.
ADVISOR ENGAGEMENT	Build relationships with wealth managers and tax attorneys to position the Foundation as a preferred vehicle for legacy giving.

\$2.0B+ CAPITAL CAMPAIGN

- **The Vision:** Mobilizing two billion dollars in capital to anchor Black arts, culture, and economics through a high-fidelity governance model.
- **The Blueprint:** A strategic geographic intervention (the 60x60 Block Plan) designed to ensure permanent, non-displaceable community power.
- **The Governance:** The Foundation (System Architect) provides fiduciary oversight for specialized subsidiaries in Real Estate, Land Stewardship, and Culture.

THE 6-YEAR DATA BANK

- **Proven Impact:** Immediate access to 72 months of successful grant metrics, project pro-formas, and community engagement data.
- **The Engine:** A fully integrated tech stack (**Virtuous, ClickUp, Momentum**) containing thousands of clean donor and volunteer records.
- **The Vault:** Signature initiative templates and "Case for Support" assets ready for rapid remixing and deployment.

4. THE SUPPORT INFRASTRUCTURE

The selected SME will be integrated into a high-performance professional workflow:

- **Tech Stack:** Proficiency required in **Virtuous CRM**, **Momentum** (AI behavior signals), **iWave**, and **Smartsheets**.
- **Production Engine:** Support from a dedicated **Proposal Architect** and **Packaging Specialist** to create custom strategic prospectuses.
- **Data Lake:** Full access to 6 years of historical metrics, community "life-to-legacy" impact data, and initiative templates.

5. COMPENSATION: REPLENISHABLE RETAINER

We utilize a **Deliverable-Based Draw-Down Retainer** model to ensure consistent partnership and accountability.

- **Monthly Retainer Balance:** \$3,000+.
- **Mechanism:** Fees are "drawn down" only upon successful completion of specific deliverables (e.g., cost per Wealth Audit/Roadmap or Private Invitation Secured).
- **Replenishment:** The Foundation replenishes the account to the agreed base level monthly upon invoice approval.

6. SUBMISSION REQUIREMENTS

Proposals must be **no more than five (5) pages** in PDF format and include:

1. **Network Summary:** Overview of experience within the private wealth landscape (Bay Area family offices or advisors preferred).
2. **Invitational Case Study:** One example of moving a major donor from "cold" status to a transformational gift.
3. **Technical Workflow:** Description of how you integrate **Momentum** or other AI behavior signals into cultivation strategy.
4. **Mock Fee Proposal:** List of service items and "draw-down" rates fitting the monthly range.
5. **The Strategic Qualifier:** (300 words max) Describe your process for identifying a "Private Invitation" within a Family Office or DAF using our **6-year Data Bank**.

Submit to: grants@blackculturalzone.org



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East Oakland, California
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"Deep Roots. Bright Future."

60×60 Block Plan · Liberation Park · East Oakland
RFP Document · Spring 2026