

ISSUED BY

Black Cultural Zone CDC

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www.blackculturalzone.org

REQUEST FOR PROPOSAL

Issued: Spring 2026
Deadline: Rolling Review

RE: Individual Giving & Community Conversion Subject Matter Expert (SME)

1. PROJECT OVERVIEW

The **Centers of Excellence Network Foundation** is seeking an elite **Individual Giving & Community Conversion Subject Matter Expert (SME)** to join our **Strategic Collaboration Ecosystem**. This role supports the **Black Cultural Zone CDC** in transforming our deep community roots into a sustainable, scalable small-to-mid-level donor engine to support 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, ensuring community members are not just passive recipients, but active co-authors of our legacy and long-term sovereignty.

2. THE STRATEGY: "SIRE"

We are moving from reactive fundraising to **Strategic Institutionalization and Resource Expansion (SIRE)**. We require an SME who can bridge the gap between community participation and financial partnership, securing the long-term independence of our neighborhoods through a robust donor pipeline.

3. SCOPE OF WORK

AREA OF FOCUS	DESCRIPTION
CONVERSION LADDER	Analyze our 6-year history in Virtuous to design personalized nurture sequences that convert supporters into recurring monthly partners.
SEGMENT STRATEGY	Identify mid-level donors ready for "Major Gift" hand-off using Momentum AI behavior signals and historical giving patterns.
FEEDBACK LOOPS	Establish digital "Impact Circles" that allow community donors to see the direct ROI of their contributions.
CAMPAIGN EXECUTION	Lead digital "Giving Season" and anniversary efforts, leveraging the data bank to prove the 5:1 ROI of donor investments.
STRATEGIC GROWTH	Identify "Private Invitation" opportunities for community-centric crowdfunding or micro-investment pilots.

\$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), **ClickUp**, and **Smartsheets**.
- **Production Engine:** Support from a dedicated **Proposal Architect** and **Packaging Specialist** for digital appeals, impact reports, and newsletters.
- **Data Lake:** Full access to **6 years** of historical volunteer data, event attendance records, and community impact metrics.

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 Automated Nurture Sequence or Digital Campaign).
- **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:

- **Community Network Summary:** Overview of experience in grassroots fundraising and digital conversion.
- **Conversion Case Study:** One example of moving a volunteer or small donor base to a significantly higher level of recurring support.
- **Technical Workflow:** Description of how you integrate Virtuous and Momentum into your engagement strategy.
- **Mock Fee Proposal:** List of service items and "draw-down" rates fitting the monthly range.
- **The Strategic Qualifier:** (300 words max) Describe how you will utilize our 6-year Data Bank to secure a "Private Commitment" from mid-level donors before launching a public campaign.

Submit to: grants@blackculturalzone.org



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"Deep Roots. Bright Future."

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