

# Request for Proposals: Fractional Development Lead

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**The Center for Health Equity & Wellbeing – New Jersey Public Health Institute (CHEW-NJPHI)** invites proposals from experienced independent consultants and small consulting teams to serve as its **Fractional Development Lead**. The initial engagement is an intensive six-month build-and-execute sprint of approximately 20–25 hours per month.

|                           |                                                                                 |
|---------------------------|---------------------------------------------------------------------------------|
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| <b>Issued</b>             | Oct 7, 2026                                                                     |
| <b>Proposals due</b>      | Nov 13, 2026, 5:00 p.m. ET                                                      |
| <b>Engagement</b>         | Initial six-month retainer, with potential continuation                         |
| <b>Anticipated budget</b> | \$3,000–\$4,500 per month (not to exceed approximately \$30,000 for six months) |
| <b>Contact</b>            | Risa Bogner, Business Finance Partner<br>rbogner@equityandwellbeing.org         |

## 1. About CHEW-NJPHI and This Opportunity

CHEW-NJPHI is New Jersey's designated Public Health Institute, with health equity as a founding priority. CHEW has successfully secured significant public and programmatic funding and is now at an important stage of organizational growth.

CHEW seeks to **intentionally diversify its revenue portfolio** and build a sustainable development function that includes philanthropic, corporate, individual, sponsorship, and other non-governmental sources of support, with particular emphasis on unrestricted and flexible revenue.

This engagement is **hands-on and execution-focused**. CHEW is not seeking a consultant who will solely develop a strategy or provide recommendations. The selected consultant will develop the strategy, establish the necessary development infrastructure, and actively lead implementation in partnership with CHEW's Executive Director, Board of Directors, staff, and other stakeholders. Strategy and fundraising activity are expected to proceed concurrently.

## **2. Scope of Services**

The Fractional Development Lead will work across nine areas, functioning as an extension of CHEW's leadership team rather than solely as an external advisor.

### **2.1 Development Assessment & Fundraising Strategy**

Assess CHEW's current funding portfolio, development readiness, organizational assets, relationships, programs, and opportunities. Develop a practical, implementation-ready strategy that:

- Establishes short-, intermediate-, and longer-term fundraising priorities.
- Identifies priority revenue streams and realistic fundraising opportunities.
- Sets fundraising goals and key performance indicators.
- Defines roles for the Executive Director, Board of Directors, staff, and consultant.
- Creates a 12–24-month development roadmap and fundraising calendar.
- Identifies the systems, policies, materials, and infrastructure needed for sustainable fundraising.
- Aligns opportunities with CHEW's mission, strategic priorities, programs, and role as New Jersey's Public Health Institute.

Early fundraising activity should begin while the broader strategy is being developed.

### **2.2 Fundraising Implementation & Fractional Development Leadership**

- Develop and manage CHEW's fundraising pipeline.
- Identify, research, and qualify prospective donors and funders.
- Develop cultivation and solicitation strategies.
- Prepare outreach, cultivation, and donor communications.
- Prepare the Executive Director and Board members for donor meetings; coordinate and, when appropriate, participate in those meetings.
- Develop proposals, concept papers, letters of inquiry, sponsorship requests, and other fundraising materials.
- Track cultivation, solicitation, stewardship, and follow-up, ensuring timely follow-up with every prospect and partner.
- Develop donor stewardship and retention strategies.

The pipeline should be a working organizational asset, for each prospect: organization, contact, relationship or connection, capacity and interest, ask opportunity, next action, owner, date, stage, and potential value.

### **2.3 Funding Diversification**

Develop and implement strategies to reduce reliance on any single funding source, across appropriate revenue streams such as:

- Private, family, and institutional foundations
- Corporate philanthropy, sponsorships, and CSR/ESG opportunities

- Individual giving and major gifts
- Health system and healthcare-sector philanthropy
- Financial institutions and community reinvestment-related partnerships
- Pharmaceutical, biotechnology, life sciences, technology, insurance, and other mission-aligned sectors
- Professional associations and strategic partners
- Event-based fundraising and sponsorship
- Unrestricted/general operating support and multi-year funding
- Other mission-aligned earned or contributed revenue

The consultant should help convert CHEW's existing partnerships, visibility, and statewide reach into appropriate philanthropic relationships, while maintaining clear ethical boundaries between grants and contracts, partnerships, sponsorships, and charitable contributions.

## **2.4 Corporate Partnerships, CSR & ESG**

- Identify corporations whose CSR, ESG, community benefit, workforce, health equity, rural health, technology, or community development priorities align with CHEW.
- Develop a prioritized corporate prospect portfolio, with entry points and decision-makers.
- Develop corporate partnership and sponsorship packages tied to CHEW's statewide mission and programs.
- Support outreach, cultivation, meetings, proposals, negotiations, and stewardship.
- Pursue multi-year corporate partnerships rather than one-time transactional sponsorships.

## **2.5 Board Development, Training & Fundraising Culture**

Building a sustainable development function requires an intentional evolution in Board and organizational fundraising culture. The consultant will:

- Assess Board development readiness and current fundraising engagement.
- Conduct Board fundraising training and education.
- Help Board members understand their roles in giving, getting, opening doors, relationship-building, ambassadorship, and stewardship.
- Develop practical tools and talking points that make Board participation accessible.
- Help establish appropriate Board development expectations, and support a Board Development/Fundraising Committee.
- Identify ways Board members can contribute beyond direct solicitation, including introductions, corporate connections, event sponsorships, and stewardship.
- Coach Board members before and after donor and prospect engagement.

The approach should be progressive, education, comfort with the case for support, personal networks, opening doors, cultivation, stewardship, then solicitation, balancing accountability with realistic expectations.

## **2.6 Case for Support & Fundraising Materials**

Develop or strengthen core development materials, which may include:

- Organizational and program-specific cases for support
- Fundraising messaging and a donor-facing organizational overview
- Sponsorship and corporate partnership materials

- Standard organizational information and boilerplate
- Impact narratives and donor stories
- A donor presentation/deck and proposal templates
- Donor acknowledgment and stewardship communications

Materials should articulate both CHEW's statewide public health role and the philanthropic case for investing in work not fully supported by government or restricted program funding.

## **2.7 Signature Fundraising Events**

- Recommend event concepts and fundraising models.
- Develop preliminary revenue and expense projections.
- Identify prospective sponsors and underwriting opportunities; develop sponsorship packages and benefits.
- Lead sponsor identification, outreach, and solicitation.
- Support event design, positioning, fundraising strategy, and implementation.
- Plan how to convert attendees and sponsors into longer-term CHEW relationships.

CHEW is particularly interested in events that can become repeatable, recognizable assets.

## **2.8 Donor Infrastructure & Development Operations**

Establish simple, scalable systems appropriate to CHEW's current stage, including:

- Prospect and donor tracking, pipeline stage definitions, and moves management
- Contact and activity documentation
- Gift acknowledgment and stewardship workflows
- A fundraising dashboard, KPIs, and development calendar
- Donor segmentation and CRM/data management recommendations
- Gift acceptance and related development policies, as needed
- Processes coordinating development with finance, communications, programs, and executive leadership

## **2.9 Executive Development Support**

Work closely with the Executive Director to maximize the role of CHEW's chief external ambassador and principal relationship-builder, including:

- Prospect strategy, prioritization, and relationship mapping
- Meeting preparation, donor briefing documents, and talking points
- Meeting participation, follow-up correspondence, and strategic introductions
- Solicitation preparation and donor stewardship
- Leveraging speaking engagements, professional networks, partnerships, and organizational visibility for relationship development

The consultant should reduce the administrative and tactical burden on the Executive Director, deploying executive time where it adds the greatest value.

## **3. Initial Six-Month Priorities**

The first six months will function as an intensive build-and-execute sprint. By its conclusion, CHEW expects to have, at minimum:

1. An actionable development and funding-diversification strategy.
2. A 12–24-month fundraising roadmap and calendar.
3. A compelling organizational case for support.
4. A functioning prospect/donor pipeline with prioritized prospects and defined next actions.
5. A corporate/CSR/ESG prospect strategy and target list.
6. Active cultivation and solicitation of priority prospects.
7. Board fundraising training and an initial Board engagement plan.
8. Development roles and expectations established for Board and leadership.
9. Core fundraising, sponsorship, and donor-facing materials.
10. At least one viable signature fundraising event concept with business case, sponsorship strategy, timeline, and implementation plan.
11. Basic donor tracking and moves-management infrastructure.
12. Defined fundraising KPIs and a simple development dashboard.
13. A recommended plan for CHEW's next stage of development capacity.

CHEW does not expect fundraising activity to be deferred until a final strategy document is complete.

#### 4. Level of Effort and Engagement Structure

CHEW anticipates an **initial six-month retainer at approximately 20–25 hours per month**. The consultant will work collaboratively with the Executive Director, designated staff, Board members, and partners as appropriate.

At the end of the six-month sprint, CHEW will formally reassess and may:

- Continue the engagement at the existing level;
- Transition to approximately 12–15 hours per month of ongoing fractional development leadership;
- Expand development capacity based on organizational growth and fundraising performance; or

CHEW is building sustainable internal capacity and expects the consultant to document systems, relationships, processes, and institutional knowledge accordingly.

#### 5. Desired Qualifications

The ideal consultant or consulting team will demonstrate:

- Significant experience building and implementing nonprofit development programs.
- A track record of personally executing fundraising activities, not solely providing strategic advice.
- Experience with major gifts, institutional and corporate philanthropy, sponsorship, and donor cultivation.
- Experience developing corporate partnerships and working with CSR/ESG functions.
- Experience building fundraising programs for emerging or growing nonprofits.
- Demonstrated ability to engage and train nonprofit Boards in fundraising.
- Strong prospect research, relationship-management, writing, and solicitation skills.
- Experience developing signature fundraising events and sponsorship strategies.
- Strong understanding of fundraising ethics and donor stewardship.
- Ability to translate complex public health, healthcare, policy, research, and community-impact work into compelling philanthropic opportunities.
- **Highly desirable:** experience in New Jersey and/or established relationships with New Jersey philanthropic and corporate communities.

- **Highly desirable:** experience in public health, healthcare, health equity, community development, or related sectors.

CHEW strongly prefers one senior fractional development leader, or a very small team in which the senior person proposed performs the work.

## 6. Budget and Compensation

| Term                         | Detail                                                                 |
|------------------------------|------------------------------------------------------------------------|
| Structure                    | Monthly retainer, approximately 20–25 hours of capacity                |
| Anticipated monthly retainer | \$3,000–\$4,500                                                        |
| Anticipated six-month budget | \$18,000–\$27,000, not to exceed approximately \$30,000                |
| Additional work              | Billed at a proposed hourly rate, only with CHEW's written preapproval |
| Reporting                    | Concise monthly development dashboard                                  |

Final compensation will depend on experience, proposed approach, level of effort, and value.

**Fundraising ethics:** consistent with the Association of Fundraising Professionals Code of Ethical Standards, CHEW will **not** compensate consultants based on a percentage of funds raised, commissions, finder's fees, or any other contingent fundraising compensation.

## 7. Performance and Reporting

The consultant and CHEW will agree on performance indicators that measure both fundraising outcomes and development activity. Measures may include:

- Number and quality of qualified prospects added to the pipeline
- Movement of prospects through cultivation stages
- Donor and prospect meetings secured and completed
- Proposals and solicitations developed and submitted
- Corporate and philanthropic relationships initiated
- Sponsorship opportunities developed and secured
- Board participation in development activities
- Fundraising infrastructure and materials completed
- Funds raised and committed
- Pipeline value and anticipated future revenue
- Donor stewardship and retention activity

The consultant will provide a **concise monthly development dashboard** summarizing activity, progress, pipeline movement, upcoming priorities, opportunities, and items requiring leadership or Board action.

## 8. Proposal Requirements

Proposals may not exceed **8 pages** (excluding work samples and references) and should address the following, in this order:

1. **Understanding of CHEW and the engagement.** Your understanding of CHEW-NJPHI, its funding landscape, and what building a diversified development function requires.
2. **Proposed approach.** How you would assess, strategize, and begin fundraising concurrently, across the nine areas in Section 2.
3. **30/60/90/180-day plan.** What you would specifically accomplish by day 30, 60, 90, and 180, including when active cultivation and solicitation would begin.
4. **Allocation of effort.** How you would allocate approximately 20–25 hours per month across the scope during the first six months.
5. **Board engagement approach.** How you would build Board fundraising capacity for a Board that has not historically operated as a fundraising board.
6. **Relevant experience.** Development programs you have built, with examples of funds raised, corporate partnerships, signature events, and Board training. Indicate which activities you personally executed.
7. **Who will do the work.** Name and brief bio of each individual who will personally perform the work, and their respective roles.
8. **References.** Two to three client references, ideally from mission-driven organizations whose development programs you helped build.
9. **Pricing.** Each of the following:
  - o Proposed monthly retainer and approximate level of effort included
  - o Specific services included within the retainer
  - o Hourly rate for CHEW-authorized work beyond the monthly allocation
  - o Whether unused hours roll forward
  - o Any anticipated additional expenses
10. **Availability.** Proposed start date and availability.

**Attachments (not counted toward the page limit):** two to three work samples, such as a case for support, a corporate sponsorship package, a funded proposal, or a Board training outline.

## 9. Evaluation Criteria

CHEW will evaluate proposals on the following criteria and may invite finalists to interview.

| Criterion                                                                                            | Points |
|------------------------------------------------------------------------------------------------------|--------|
| Demonstrated hands-on experience building and executing development programs                         | 25     |
| 30/60/90/180-day plan and approach, concrete, execution-focused, strategy and fundraising concurrent | 25     |
| Corporate partnership, CSR/ESG, and major gifts experience                                           | 15     |
| Board development and training approach                                                              | 10     |

| Criterion                                                                     | Points |
|-------------------------------------------------------------------------------|--------|
| Cost and value                                                                | 10     |
| New Jersey philanthropic/corporate relationships and health-sector experience | 10     |
| References                                                                    | 5      |

CHEW is not obligated to select the lowest-cost proposal.

## 10. Timeline and Submission Instructions

| Milestone                           | Date         |
|-------------------------------------|--------------|
| RFP issued                          | Oct 7, 2026  |
| Written questions due               | Oct 23, 2026 |
| Answers posted to all respondents   | Oct 30, 2026 |
| <b>Proposals due (5:00 p.m. ET)</b> | Nov 13, 2026 |
| Finalist interviews (week of)       | Dec 1, 2026  |
| Selection and notification          | Dec 11, 2026 |
| Anticipated engagement start        | Jan 4, 2027  |

CHEW reserves the right to adjust this timeline.

**How to submit:** Email one PDF to [rbogner@equityandwellbeing.org](mailto:rbogner@equityandwellbeing.org) with the subject line **“RFP Response – Fractional Development Lead.”** Questions must be submitted in writing to the same address; answers will be shared with all respondents.

## 11. General Terms

- This RFP does not commit CHEW-NJPHI to award a contract or to pay any costs incurred in preparing a proposal.
- CHEW may accept or reject any or all proposals, request additional information, negotiate scope and price with any respondent, or cancel this RFP at any time.
- The selected consultant will serve as an independent contractor under a written consulting agreement with CHEW.
- All donor and prospect data, pipeline records, materials, and work products created under the engagement are the property of CHEW-NJPHI.
- The consultant must disclose any potential conflicts of interest, including current clients soliciting the same funders, and keep CHEW's non-public and donor information confidential.
- The consultant will adhere to the Association of Fundraising Professionals Code of Ethical Standards and the Donor Bill of Rights.
- CHEW encourages proposals from minority-, women-, veteran-, and disability-owned businesses and from New Jersey-based consultants.

*The Center for Health Equity & Wellbeing — New Jersey's Public Health Institute*