

FOUNDED 1916



Florida Engineering Society

Proposal for Services

January 2013

Prepared by:



January 23, 2013

Mr. Frank Rudd, CMP, CAE
Executive Director
Florida Engineering Society
125 South Gadsden Street
Tallahassee, FL 32301

Dear Frank:

Thank you for your interest in the services of Association Development Solutions (ADS). It was a pleasure speaking with you, Angelina Fairchild, and Glenn Forrest about the organizational development and fundraising priorities of the Florida Engineering Society (FES).

Based on our discussion, ADS understands that the FES seeks to enhance its fundraising performance to support the celebration of its Centennial Anniversary as well as its strategic priority initiatives in the areas of advocacy, education, professional and workforce development. On a daily basis, ADS is working with its Professional Society clients to maximize their fundraising returns for similar funding priorities. As a result, we believe there are tremendous opportunities for the FES to build upon your invaluable leadership and contributions for more than a decade of advancing the organization's mission while achieving a demonstrable track record of success.

With its strategic plan and your leadership, FES is poised to further establish itself as a valued resource for its members and the engineering community in the state of Florida. In order to meet these objectives and the Society's expectations, FES would benefit from a comprehensive fundraising strategy that leverages its unique value proposition and the strength of its leadership.

As a specialty fundraising firm solely dedicated to serving the association community, ADS understands the inherent challenges facing professional societies and brings a flexible approach to each client engagement when determining how best to navigate the barriers to success. Ultimately, we provide the expert guidance, evidence-based methodology, and hands-on support required to enable a professional society to fulfill its mission.

Enclosed is a Development Planning Assessment proposal for FES's consideration that will deliver the following:

- A compelling rationale for investment in the FES;
- Defined roles and responsibilities for FES board members and the guidance to successfully identify and recruit others who are willing and able to serve;
- An understanding of current professional society fundraising strategies in order to maximize fundraising returns and not cannibalize the FES's existing revenue streams, as well as how to strategically leverage other FES entities such as the Florida Institute of Consulting Engineers (FICE) and the Florida Engineering Foundation (FEF);

- A top 25 list of potential prospects who should be approached initially and in what sequence to establish the momentum necessary to reach the desired fundraising goals;
- An annually renewable professional society fundraising plan that produces immediate revenue for the FES from multiple funding sources and serves as the baseline of support from which to build upon each year; and
- A fundraising strategy that creates the momentum required to generate funding annually in order to exceed operational expenses and deliver residual value by building the FES's reserves.

ADS is prepared to move quickly if the FES desires to begin conducting the fundraising assessment in early 2013, which would lay the groundwork for the remainder of the year and for 2014. I look forward to the opportunity to discuss this proposal with you and your leadership at your earliest convenience.

Sincerely,



Scott C. Ball
Vice President
Association Development Solutions

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GOALS OF THE DEVELOPMENT PLANNING ASSESSMENT

Developing a Compelling Case

The strategic goals of the Florida Engineering Society and any other FES funding priorities must be articulated in a way that is compelling, makes good business sense, and inspires investment. The assessment process helps develop a comprehensive case statement that incorporates sentiments toward the FES's plans and priority needs. Additionally, the assessment process elevates awareness of the FES including the organization's mission and vision as well as making its goals even better known.

Identifying Member Leadership

ADS anticipates that the FES Board will play a prominent role in soliciting any funding related to the case for support. That said, based on ADS experience the assessment process is helpful in identifying additional leadership candidates who may be instrumental in either further development of the case for support and/or soliciting funding from priority prospects. As a result, the assessment will help identify and even cultivate top potential leaders. Additionally, ownership and consensus among the FES Board of Directors is essential to overall fundraising success, especially if the case supports FES funding priorities. An outline of key fundraising leadership qualifications, candidates and roles and responsibilities is included in the final assessment report.

Planning Initial Solicitations

Some of the most difficult aspects of a major fundraising initiative present themselves immediately. Where do we begin? Whom do we ask first? The assessment answers these questions by identifying the supporters who should be approached in the initial phases of a fundraising initiative to provide pace-setting commitments and leadership.

An important aspect of the assessment will be identifying and planning strategies for these initial solicitations. Not to be overlooked are plans for how to approach a broader audience of qualified prospects to garner widespread support.

Marketing and Communications

Communication is critical to any fundraising initiative. How do we share the news with our stakeholders? When do we announce it publicly? More importantly, how do we announce the fundraising initiative? The assessment will identify the key messages and ideal channels for the development of a marketing and communication strategy for the dissemination of FES fundraising information.

Development Review

The assessment process offers an opportunity to review how funds are currently being raised, the effectiveness of promotional materials and public relations strategy, and the reaction to recently completed projects.

Identifying a Realistic Fundraising Goal

Based on the quantifiable needs of FES, the findings of the development planning assessment, and ADS's experience in fundraising, a challenging yet achievable goal will be determined for a comprehensive fundraising effort.

Investor Recognition Strategy

Conducting a major fundraising initiative presents many opportunities for investor recognition. The planning assessment will begin to develop an investor recognition program for FES's fundraising program.

Cultivation plan

Interviews during the assessment will begin to uncover personal relationships or connections and information about potential major investors. The interview process will initiate cultivation strategies for potential leaders, select corporations and other qualified prospects. As the assessment moves forward, the fundraising initiative's early cultivation plan will begin to take shape.

Timetable and Budget

How long will it take to raise the funds and what are the projected costs are two of the most pressing questions from ADS clients. The final assessment report will provide a multi-phased fundraising timetable, operational budget and consultative fee based on the length of service required.

THE DEVELOPMENT PLANNING ASSESSMENT PROCESS

- I. Become familiar with the current FES, FICE, and FEF needs for funding.**
- II. Refine the plan for conducting the assessment.**
- III. Develop the assessment materials:**
 - A. Interview request letter
 - B. Two to three page background statement (preliminary case for support)
 - C. Preliminary table of commitments to reach desired fundraising goal(s)
 - D. Questionnaire/discussion stimulant
 - E. Electronic survey for FES members
 - F. Thank you letters
- IV. Complete and finalize the list of assessment participants that will include:**
 - A. FES Board of Directors and other leaders associated with FICE and FEF
 - B. Administration and staff
 - C. Prominent FES members (Key Opinion Leaders, Committee Chairs, Active Members, etc.)
 - D. Other stakeholders such as corporations, foundations, etc.
- V. Fundraising review and analysis:**
 - A. Current literature and promotional materials
 - B. Previous and existing fundraising efforts
 - C. Organizational readiness
 - D. Recent projects
 - E. Infrastructure and staffing requirements
- VI. A minimum of Seventy-Five (75) strategic discussions will cover five strategic areas:**
 - A. Familiarity, attitudes and perceptions toward FES, FICE and FEF:
 - i. Knowledge of programs and services, including recent projects
 - ii. Understanding and evaluation of FES, FICE, and FEF
 - iii. Strengths and weaknesses
 - iv. Perceptions regarding programs, services and overall performance

- B. Case for support:
 - i. Reaction to plans outlined in the preliminary case
 - ii. Understanding of FES, FICE and FEF and interest in program needs
 - iii. Suggestions and recommendations to enhance and refine the case
 - iv. Other issues to be considered

- C. Suggestions, advice and strategies:
 - i. Prospective key leadership positions and leaders for each fundraising phase
 - ii. Prospective investors of \$5,000, \$10,000, \$25,000 and above
 - iii. Feasibility of tested goal
 - iv. Fundraising initiative timetable and strategies
 - v. Potential issues and obstacles

- D. Organizational and Personal involvement:
 - i. The FES, FICE and FEF as a funding priority (high, medium, low)
 - ii. Personal willingness to lead or accept special assignments
 - iii. Organizational (or personal, if applies) willingness to invest (general range)

- E. General advice:
 - i. Identify issues that might stand in the way of success
 - ii. Discuss the appropriate timing for a fundraising initiative
 - iii. Suggestions for communicating the need
 - iv. Other recommendations that might help the fundraising initiative

VIII. Electronic survey:

- A. Conduct an electronic survey of the FES membership for a broader sample of data which can be compared against the personal interviews.

IX. Interim Report:

- A. Midway through the assessment process, ADS will prepare a report on key findings and make preliminary recommendations.

X. Final Assessment Report

- A. Introduction and assessment methodology
- B. List of assessment participants
- C. Findings
- D. Evaluations
 - i. Case components
 - ii. Financial potential
 - iii. Fundraising leadership
 - iv. Timing/strategy
 - v. Potential concerns
 - vi. Development review and organizational readiness
- E. Recommendations
 - i. Goal(s)
 - ii. Table of commitments
 - iii. Presentation of the case
 - iv. Fundraising initiative volunteer organization
 - v. Audiences to be approached
 - vi. Leadership qualifications, roles and responsibilities
 - vii. Preliminary leadership suggestions
 - viii. Cultivation and solicitation strategies
 - ix. Initial visits and solicitation sequence
 - x. A list of major prospects is included under separate, confidential cover
 - xi. Preliminary fundraising timetable
 - xii. Marketing and communication program
 - xiii. Investor recognition program
 - xiv. Infrastructure and staffing requirements
 - xv. Operational budget

ADS DELIVERABLES

- ✓ ADS executive oversight
- ✓ Dedicated ADS personnel to manage the assessment process through to completion
- ✓ Two (2) to Three (3) site visits to collect data, provide updates and present the final report
- ✓ Weekly calls with client for updates on progress and the strategy to complete the assessment
- ✓ Provide initial consultation, organization and preparation for the assessment
- ✓ Case for support development to maximize fundraising returns
- ✓ Draft assessment timetable and plan
- ✓ Development of draft assessment operative materials
- ✓ Prepare for and manage Assessment Ad Hoc Committee calls or meetings
- ✓ Assist in the development and refinement of the list of assessment participants
- ✓ Conduct a minimum of seventy-five (75) personal interviews*
- ✓ Conduct electronic survey and analyze responses
- ✓ Data entry of assessment interviews
- ✓ Deliver interim assessment report with preliminary findings and observations
- ✓ Prepare and present a comprehensive final assessment report
- ✓ Provide management of scheduling and coordinating the interviews
- ✓ Prepare a comprehensive set of actionable recommendations to reach the recommended fundraising goal(s)

** ADS anticipates the majority of interviews will be conducted over the phone, but can work with FES on scheduling in-person interviews, when appropriate.*

PROPOSED TIMELINE FOR A DEVELOPMENT PLANNING ASSESSMENT

On the following page is a proposed timeline for the FES's Development Planning Assessment. If ADS were retained by FES to conduct the assessment, we anticipate a total of ten (10) to twelve (12) weeks to organize and prepare; conduct the interviews; and prepare the final assessment report. Should FES decide to engage ADS in early 2013, this represents the ideal time to talk with companies about their funding priorities for the remainder of the year and in 2014.

It should be noted that an organizational phase is needed to provide a proper platform for success. ADS leadership would work closely with FES leadership to ensure that the essential assessment tools and strategies are developed and approved prior to the interview process. These materials include the preliminary case statement, introductory correspondence, potential interviewee list, commitments chart and interview questionnaire. ADS views its working relationships with its clients as an important partnership. As a result, we minimize surprises with advanced planning and clear lines of regular communication to ensure expectations are met throughout the development assessment process.

The ADS Assessment will unfold over a ten (10) to twelve (12) week timetable as follows:

Internal Assessment	Week 1	▪ Case for support data collected and begin drafting
		▪ Invite letter and assessment questionnaires drafted
		▪ Staff & Board candidates selected
		▪ External Assessment candidate list finalized
		▪ Development data and marketing samples collected
		▪ Identify Ad Hoc Committee candidates
		▪ Association fundraising best practices identified
	Weeks 2-3	▪ Preliminary case for support finalized
		▪ Ad Hoc Committee recruited and hold orientation call
		▪ Letters sent to all Internal Assessment candidates
		▪ Schedule for internal candidates finalized
		▪ Staff and Board interviews conducted
		▪ Database/record keeping procedures assessed
	Weeks 4-5	▪ Additional data requested & gathered
		▪ Staff & Board interviews completed
▪ Convene Ad Hoc Committee, as needed		
▪ Test Case Document Finalized		
▪ Send external candidates invite letter and finalized case document then begin scheduling interviews		
External Assessment	Weeks 6-7	▪ Begin external interviews by phone & in person
		▪ Interim Report completed & presented
		▪ Continue external interviews
		▪ Prepare and send electronic survey
		▪ Enter interview data into assessment database
	Week 8-12	▪ External interviews and e-survey completed
		▪ Final information requests from internal leaders
		▪ Benchmark/comparative analysis of data gathered
		▪ Draft Assessment Report written & presented

ASSISTANCE REQUIRED BY FES

- ✓ **Identification of a 3-5 member Assessment Ad Hoc Committee to:**
 - Review and approve all working documents;
 - Assist in the identification of Assessment participants; and
 - Review progress at strategic stages and ensure that desired outcomes are achieved.

- ✓ **Appointment of an Assessment liaison to:**
 - Serve as a primary point of contact and information source;
 - Assist in the coordination of interviews; and
 - Support internal and external communications.

PROFESSIONAL FEE & OPERATIONAL BUDGET

Fees for Service

Based on the level of staffing and the outlined timetable, professional consulting fees will be \$30,000 and billed as follows:

- ***Delivery of Interim Report = \$15,000***

- ***Delivery of Final Report = \$15,000***

In addition to the consulting fees outlined above, there will need to be a separate budget established for operational expenses related to the conduct of the Assessment not to exceed \$X,XXX*. Projected expenses may include, but are not limited to required travel, postage, phone or teleconference charges, meeting registrations and accommodations, copies of operative materials and reports.

* This projection is based on conducting interviews via phone. In the event additional travel is required this may need to be adjusted by mutual consent. If resources are available, ADS utilizes industry meetings to conduct personal interviews whenever possible.

Letter of Agreement

If retained by the Florida Engineering Society, ADS will submit a letter of agreement confirming the terms of the Assessment process.

Information shared in this proposal is confidential and remains the property of ADS. Any reproduction or sharing of this information without the approval of ADS is strictly prohibited.

REFERENCES

Ms. Patricia Blake, CAE
Executive Director, ASGE
American Society for Gastrointestinal Endoscopy
Oak Brook, IL
(630) 570-5605

Ms. Daphne Bryant
Executive Director, GBTA Foundation
Global Business Travel Association Foundation
Alexandria, VA
(703) 236-1141

Mr. Edward Cronin, CAE
Executive Director, AHRA
American Healthcare Radiology Administrators
Sudbury, MA
(800) 334-2472

Mr. David DuBois, CMP, CAE, FASAE, CTA
President, IAEE
International Association for Exhibitions and Events
Dallas, TX
(972) 458-8002

Mr. Fred Fortman, CAE
President, ASSE
American Society of Safety Engineers
Des Plaines, IL
(847) 699-2929

ASSOCIATION DEVELOPMENT SOLUTIONS

The Firm

- Association Development Solutions (ADS) is the premier consulting firm solely dedicated to meeting the unique fundraising needs of the association community.
- As association specialists, ADS team members understand the unique factors that influence association fundraising, and possess the skills to identify and leverage each funding opportunity.
- ADS currently represents national and international clients such as: Global Business Travel Association, American Society of Gastrointestinal Endoscopy, American Society of Safety Engineers, American Healthcare Radiology Administrators, and International Association of Events and Exhibitions.
- Executive leadership brings more than 50 years of successful fundraising experience to each client relationship; including support for distinguished organizations such as: Joint Commission, Rotary International and Meeting Professionals International.

More than 90% of ADS clients represent repeat business or are direct referrals.

Our Philosophy

- We believe in developing synergistic partnerships between societies and their stakeholders. We seek to define funding opportunities that are mutually beneficial, produce measurable returns and maximize results.
- We believe fundraising is a process that develops through specific steps: analysis and planning, organization, cultivation, solicitation, closure and continuing investor relations.
- We believe successful fundraising is a sales dynamic. Success requires the effective marketing of an organization's vision and services, educating its stakeholders and providing exposure and alignment to contributing companies.
- We believe fundraising goals not only should be obtainable, but generously oversubscribed. A successful partnership program is the key to an organization's future growth.
- We believe fundraising should be a positive experience for all. It should improve the image, vision and reputation of an organization by bringing stakeholders together in partnership.

*You know your industry; our firm knows association fundraising...
and how we can apply it to your professional community!*

THE ADS DIFFERENCE

Experienced Service – All clients are serviced by experienced members of the ADS team. We collaborate to bring clients the combined knowledge of our team, rather than a one-dimensional perspective. Your Assessment process will be managed by ADS President, David Hanneman with assistance from Scott Ball, Vice President. This team has nearly 40 years of combined experience, and has worked extensively with professional associations and societies.

Specialists – With a singular focus on the association marketplace, ADS is at the forefront of emerging industry trends. We have assisted clients in building mutually-beneficial relationships with prominent industry leaders. Through innovative industry-specific solutions, our association clients increase revenues, often producing unprecedented returns leading to transformational results.

Proven Process – Our professionals are development experts who deliver exceptional results through a tailored process based on experience. At ADS, we pride ourselves on the ability to create a streamlined course of action and manage our clients' costs effectively. Our goal is to deliver successful and innovative fundraising solutions tailored to your needs with expertise and integrity.

A Full-Service Firm – ADS is able to offer its clients the most comprehensive compliment of specialized association development solutions available. Whether an association needs organizational support, staff training, trustee orientation, fundraising consultation and management services, or desires a partner to outsource its fundraising functions, ADS has the solution.

Non-Invasive Approach – We adapt quickly to integrate with your team, handling every small detail while keeping you apprised of the program's status - allowing your staff to concentrate on daily responsibilities.

Our success is built upon developing professional relationships, expertly matching our resources to our clients' needs, and doing so with integrity and responsiveness.

ADS ASSESSMENT TEAM

ADS Director

An ADS Director will be assigned as a dedicated resource to manage the daily activities of the Development Planning Assessment process.

Scott C. Ball – Vice President

Scott C. Ball is Vice President of Association Development Solutions. He brings to your program more than 15 years of fundraising industry experience to his position and has been instrumental in the design and execution of transformational initiatives, which have raised nearly \$250 million in new revenues. A wide variety of trade associations and professional societies have benefitted from Scott's counsel especially in the meetings, hospitality, corporate travel, exhibitions and events and health care industries. Prior to joining Association Development Solutions, Scott held the position of Vice President at an international fundraising firm.

Within the industry he has served as the Chair of the Foundation and Development Shared Interest Group for the Association Forum of Chicagoland and as Chair of the Supplier Partner Working Group which represents more than 1,200 supplier members as well as a member of the Editorial Working Group. He also is a member of the American Society of Association Executives Consultants Section Council. Scott regularly leads discussions on organizational development, corporate partnerships and he regularly speaks on fundraising and sponsorship panels.

David J. Hanneman – President

David J. Hanneman is Founder and President of Association Development Solutions. He has been an executive consultant to the non-profit industry for the past 27 years and is a frequent speaker at association events. David is a founding board member of the National Business Travel Association Foundation and active on several non-profit boards. He maintains active membership in the Association of Fundraising Professionals (AFP), American Society of Association Executives (ASAE) and Association Forum of Chicagoland (Forum).

David has provided professional counsel and executive supervision to national and global associations and utilizes these personal experiences to target and tailor client solutions. He is a recognized leader in the association industry and respected ally to organizations that have raised more than one billion dollars.

CLIENT EXPERIENCE

Organizations that have benefited from our counsel include:

- Academy of General Dentistry in Chicago, IL
- American Academy of Hospice and Palliative Medicine in Glen View, IL
- American Society of Facial Plastic and Reconstructive Surgery in Alexandria, VA
- American Society of Pediatric Dentistry Foundation in Chicago, IL
- American College of Phlebology in San Leandro, CA
- American College of Prosthodontists Education Foundation in Chicago, IL
- American Healthcare Radiology Administrators in Sudbury, MA
- American Oil Chemists Society in Urbana, IL
- American Society for Clinical Pathology in Chicago, IL
- American Society for Gastrointestinal Endoscopy Foundation in Oak Brook, IL
- American Society of Colon and Rectal Surgeons in Arlington Heights, IL
- American Society of Echocardiography Foundation in Morrisville, NC
- American Society of Safety Engineers in Des Plaines, IL
- Arthritis Foundation in Atlanta, GA
- Arthroscopy Association of North America in Rosemont, IL
- Association of PeriOperative Registered Nurses in Denver, CO
- Cervical Spine Research Society in Rosemont, IL
- Chicago Realtors Association Education Foundation in Chicago, IL
- Cosmetic Surgery Foundation in Chicago, IL
- Eastern Association for the Surgery of Trauma in Chicago, IL
- Emergency Nurses Association Foundation in Des Plaines, IL
- Exhibition Industry Foundation in Dallas, TX
- Global Business Travel Association Foundation in Alexandria, VA
- International Association for Exhibitions and Events in Dallas, TX
- International Society of Arthroscopy, Knee Surgery and Orthopedic Sports Medicine in San Ramon, CA
- Institute of Real Estate Management (IREM) in Chicago, IL
- Investigative Reporters and Editors, Inc. in Columbia, MO
- Joint Commission for the Accreditation of Healthcare in Oak Brook, IL
- Joint Commission Resources in Oak Brook, IL
- Meeting Professionals International Foundation in Dallas, TX
- National Automatic Merchandising Association in Chicago, IL
- National Association of Dental Plans in Dallas, TX
- National Association of Insurance Commissioners in Kansas City, MO
- National Auctioneer's Association in Overland Park, KS
- National School Boards Foundation in Chicago, IL
- National Utility Contractors Association in Arlington, VA
- Professional Convention Management Association Education Foundation in Chicago, IL
- RV/MH Heritage Foundation, Inc. in Elkhart, IN
- Society of Gynecologic Oncology in Chicago, IL
- Society for Vascular Surgery in Chicago, IL
- Society of Surgical Oncology in Arlington Heights, IL
- Washington Technology Industry Association in Seattle, WA