
RESPONSE QUESTIONNAIRE

AGENCY OVERVIEW

Please provide your firm's name, address, telephone, and fax numbers. Please include the name of the contact responsible for this questionnaire within your firm and his or her email address and direct phone number.

TJ Marie Consulting
1515 S. Michigan Avenue
T3C
Chicago, IL 60605
Phone: 312 620-2361

Responsible Party:
Tiffany Williams
Principal and Managing Director
tiffany@tjmarieconsulting.com

Please describe your firm's background and history. Please include principals of the firm and their backgrounds. Describe ownership structure and provide relevant information.

TJ Marie Consulting (TJM) was founded by Tiffany Williams, a veteran fundraising consultant with more than a decade of experience helping organizations strengthen their operations, elevate donor engagement, and raise philanthropic dollars to fund their goals and missions. Tiffany leveraged her big-firm professional experience, bringing established networks, geographic and sector experience, and training and expertise, to form a boutique fundraising firm without sacrificing the powerful capabilities of big traditional firms. TJM prioritizes client-consultant relationships and employs a personal, tailored approach to every engagement, a hallmark of the TJM experience. Since its founding, TJM has maintained a strong cross-country portfolio of nonprofit clients who have engaged the firm in a variety of services. Service offerings include internal assessments, designing operational and fundraising plans, designing and managing major gift and capital campaigns, undertaking prospect research, strategic planning, board training and development, and interim management. TJM is a privately held corporate entity. Tiffany Williams is the sole owner and employs a dedicated team of part- and full-time associates and consultants who work collaboratively to engage in client work.

Please provide a brief overview of your agency's philosophy.

The TJ Marie Consulting philosophy, at its foundation, is the center of our work with clients.

A bias toward action.

Our plans are conceived as actionable steps, not simply written recommendations. We seek to answer the how to do, not only the what to do. We are entrepreneurial in our founding, and the concept is evidenced throughout our work. We explore opportunities to act and engage internally and encourage our clients to do the same with their various constituencies and in the communities they serve.



Informed by data.

What does the data say? It’s a common refrain in our collaborative conversations. Whether making recommendations for feasibility studies, designing operational plans, or segmenting portfolios, we make decisions informed and backed by data metrics.

Proven fundraising principles.

While we are agile and creative in how methods are employed, we know what works well, as evidenced by commonly held principles of engagement and fundraising.

A tailored approach.

Our clients are not just another organization in a long list of client engagements. Each engagement project is uniquely tailored and designed according to a customer’s needs, budget, and within their own geographic, sector, and constituency landscape. There are no cookie-cutter designs with TJM.

Honesty, integrity, and shared affinity.

We endeavor to be honest and integrous, in our relationships and expect the same from the partnerships we engage in. We exclusively partner with organizations that share our core values of service, inclusivity, compassion, respect, and integrity.

Please provide an overview of your agency’s capabilities.

Our service offerings include:

- feasibility studies
- internal assessments
- operational and annual fundraising plans
- prospect research
- major gift campaign design & management
- board development and training
- interim management

Our capabilities and assets include:

- Virtual and on-site consulting
- Virtual and digital offerings
- Access to research tools
- Multi-discipline partnerships

Describe how your agency differentiates itself from its competitors.

TJM brings big-firm experience and the breadth and scope of geographic and cross-sectional learnings, employing standard fundraising principles and relevant cross-sector learnings. Our firm brings to bear the full scope of our work across the entire United States and Canada.

We exclusively work with nonprofits with whom we share an affinity for the mission. We believe that people do their best work when they are invested personally as well as professionally.

We understand the cultural and social implications of working with generationally and racially diverse clients – an important characteristic, especially in our current national climate.

We have experience working with clients whose donors reside across the United States. Most organizations serve local constituencies. Higher education foundations are among a unique group of nonprofit sectors for whom experience engaging national constituencies is important.



DIVERSITY & INCLUSION

Can you share data on the agency's diversity? How diverse is the executive team? Is the leadership team committed to diversity? Are the agency's recruiting efforts supporting a diverse culture? What diversity, inclusion and cultural competence training does your team complete? Does the agency have any other diversity programs in place?

TJM is dual certified as a Minority and Woman-Owned Business Enterprise. At TJM, we didn't have to create a plan of action to give Black vendors, employees, and associates their fair and equitable place within our organization, in the wake of recent national unrest. TJM was founded by a Black female, HBCU Graduate. We have had a consistent eye to diversity in our networks, our vendors, our associations, and affiliations since our founding. We are represented by a diverse team of highly qualified associates, researchers, and directors. We believe fiercely in Black entrepreneurship, diverse investment, and diverse partnerships.

Additionally, our principal and managing director, Tiffany, is a thought leader in matters of Black philanthropy – regularly lending her voice and insight for speaking engagements and in professional circles including nonprofit-centered podcasts, webinars, and national organizations. Tiffany is a member of Women of Color in Philanthropy and Fundraising, the Association of Fundraising Professionals Black Affinity Group, and was recently awarded the Corporate Achievement recognition for the National Association of Women Owned Businesses.

Though TJM has no formal diversity training, we encourage associates and contractors to be open and honest about issues of diversity without fear of retribution, shaming, or dismissal. Our culture is one of cultural appreciation; and we are committed bravely pushing the conversations in our industry and to being an example of the changes we desire to see in our industry.

We have a specific affinity for historically Black institutions and missions and Black community progress. Black Lives Matter isn't just a popular declaration. It's our lived, shared experience, and is embedded in our firm's DNA.



CLIENT RELATED QUESTIONS

Please provide a list of current and former educational institutional clients for whom you have done similar work, including partnering with independent contractors. Include background on size and scope of task, board structure, and total amount of managed funds. Please provide projects similar in nature that you have successfully completed and implemented.

Name	Assets	Engagement type
Ursuline College	\$96M	Feasibility study, campaign design, campaign management
Smithsonian Institute	\$5B	Campaign design, leadership committee formation and management, campaign management, corporate program design, and implementation
After School Matters	\$46M	Internal assessment, feasibility study, campaign design
North Park Elementary	\$100K	Internal assessment, board training, feasibility study, campaign design, campaign management

See proposal for other client examples.

Please list some clients you've had long-term relationships with and why the relationship has been successful:

- ElevateMeD, Phoenix, Arizona
- North Park Elementary School, Chicago, Illinois
- Lincoln Park Community Services, Chicago, Illinois

As we ask our clients to focus on relationship building in their donor engagement, we believe that the key to successful client-consultant engagement is building relationships. Our relationships have been successful because of accessibility, collaboration, and reliability.

Accessibility

We provide each client with their own custom link for scheduling a phone or video meeting with their primary director. This provides a direct line of accessibility and eliminates the back-and-forth schedule coordination commonly experienced in aligning schedules.

Collaboration

Each client environment is different. We don't apply a cookie-cutter solution to client needs. Instead, we work in partnership to apply our experience and expertise with the inherent knowledge and passion of the people who know the organization best – its staff and leadership. This is central to a successful engagement.

Reliability

We are always listening and learning. In a constantly changing environment, no one team has the solution to every problem. Our clients rely on us to be actively engaged with organizations and associations and to update our library and knowledge base to ensure we're bringing the latest in learnings, technology, and trends to our client engagements. They know that the information they're receiving is reliable, tested, and informed by data.



ACCOUNT TEAM RELATED QUESTIONS

Describe the team structure and how resources would be allocated. List proposed team members, including biographies, billing rates and level of participation in the account.

— At TJM, we work as one team. Each client is assigned a primary director with whom they communicate and can expect to be their principal point of contact. Other team members can be deployed to work on parts of project engagements, depending on the scope and area of greatest need.

Each team member brings a robust portfolio of experiences and a unique area of expertise. We meet internally and work collaboratively, leveraging our collective strengths to bring our clients the best experience for their needs. Until the work commences, and the calendar and timelines have been finalized, it's difficult to pre-allocate each team member's level of participation.

Clients are billed monthly for service at the professional rate (see proposal for details).

See Your Team section in proposal for biographies.

Please provide client references.

— See References section in proposal.

Who would be responsible for managing timelines and budgets?

— Tiffany Williams, the firm's principal, and managing director is responsible for overseeing timelines and budgets.

Given the scope of work outlined for this project, we intend to engage a marketing and communications firm to partner with us for the Communications/Branding/Public Relations/Marketing portion of the project. See proposal for details.

INDUSTRY EXPERIENCE RELATED QUESTIONS

Describe your experience with the higher education market and provide two (2) relevant case studies.

— **Ursuline College**

In response to a tornado that ravished the campus of Pepper Pike Ohio's Ursuline College, Tiffany partnered with administrators to conduct a rapid Feasibility Study in preparation for a \$5 million campaign to replace its destroyed gymnasium. Tiffany leveraged her experiences, elevating the school's needs in all facets of fundraising, quickly activated its volunteer and board leadership, and oversaw the entire fundraising processes to launch The Rebuilding Campaign. The effort had surpassed its goal after only five months with her leadership.



Smithsonian Museum of African American History and Culture

The Smithsonian Institution is the world's largest museum, education, and research complex. When a big firm needed extraordinary experience and experience with diverse populations, they contracted TJ Marie Consulting to take on this world-renown institution's fundraising plans.

Tiffany was responsible for leading the design of the institution's \$350 million endowment effort, recruiting and coordinating leadership teams, reporting to the high-profile board, refining recognition and naming opportunities, and working with our nations' foremost leaders in philanthropy, foundations, corporations, and arts and culture industry.

Tiffany also served in advisory roles for consultant engagements at Howard University (internal assessment, and Xavier University – campaign design).

BUDGET RELATED QUESTIONS

How do you bill for your services?

TJ Marie Consulting bills clients according to the contract's payment schedule via invoice. See proposal for details.

Please suggest a budget that would encompass the program components listed above and describe how you would allocate resources in accordance with that budget. What is your fee schedule? Will these fees be constant? If not, please describe.

TJ Marie Consulting's professional fee for the four-part engagement we propose includes consultative service, board training and development, an operational assessment, fundraising strategy and planning, and one month of implementation and board reporting as detailed in the proposal is \$17,500 per month over the length of the engagement.

If agreed, our proposal includes one week per month on site. The Foundation can choose travel actuals, or pay a one-time fee of \$6,200 at the commencement of the contract to offset travel-related costs.

All engagements include access to the firm's suite of digital and software resources.

See proposal for details.

What is your mark-up for project managing other service vendors and/or for out-of-pocket expenses?

There are no further fees for our vendors. All vendors included in the proposal are included in the project fee.



Please include a detailed description of all services included in the above fees. List all services not included and the fees you would charge for each service.

- Board training
- Policies development
- Operational assessment and report
- Guided fundraising planning
- Communications and marketing audit and recommendations
- Oral presentations to board and leadership

See proposal for details.

Do the fees described above differ from fees charged to other clients? If yes, please explain.

Each client and engagement type is unique. Many factors determine the fee for service including the scope and scale of the engagement, relevant deliverables, and anticipated human capital needs. The fees outlined are in line with our regular fees for an on-, off-site hybrid engagement of this scope.

Our standard monthly contract fee is \$18,000. We have applied a \$500/month repeat-client discount for this project.

FINANCIAL INFORMATION AND LEGAL ISSUES

Do you have any clients that could pose a conflict of interest? Does your firm have a written Code of Conduct, Ethics Policy or Conflict of Interest Policy? Please include copies of each. Describe any legal issues or constraints that could affect a relationship with the FAMU Foundation.

There are no known conflicts of interest or legal issues that would affect a relationship with the FAMU Foundation. Below is the verbiage included in each contract regarding non-disclosure, conflict of interest, and ethics:

NON-DISCLOSURE OF CONFIDENTIAL INFORMATION

TJM shall not publish or disclose any confidential information relating to any aspect of <CLIENT> operations. Such information will only be used by TJM to fulfill its obligations under this Agreement. The terms of this provision survive the termination or expiration of this Agreement.

COPYRIGHTS AND PROPRIETARY MATERIAL

All works developed by TJM for <CLIENT> shall be the property of <CLIENT>. TJM represents that the works shall not infringe upon any rights of third parties. To the extent that TJM uses strategies, ideas, methods related to fundraising and copyrightable works it developed prior to this Agreement to



perform services for <CLIENT> ("Proprietary Material"), such Proprietary Material shall remain the property of TJM. <CLIENT> may utilize Proprietary Material for its internal fundraising purposes.

ETHICS

TJM represents that it will adhere to the highest professional and ethical standards of the fundraising profession and shall perform services in accordance with its best professional judgment. TJM agrees to the International Statement of Ethical Principles in Fundraising, adopted in July 2018 and the AFP Code of Ethical Standards, adopted in February 2015.

CONFLICT OF INTEREST

TJM does not have a conflict of interest policy. We will review and adhere to an organization's conflict of interest policy, subject to legal review

MISCELLANEOUS QUESTIONS

Describe how the consultant engages with a client on a new account.

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We begin each engagement with a meeting to discuss the timeline, scope, our shared responsibilities, and the introduction of our teams. We provide the contact information, set our regular meetings, and provide the link for off-schedule meetings.

We then provide a memo with the requested information, according to the engagement type. It is important that we have a full understanding of the roles and responsibilities of each staff member, and initiate our work from there with an outline of the first 30 days.

Add any additional information you believe is relevant to the management and execution of this program.

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Thank you for inviting TJ Marie Consulting to submit a proposal for your consideration. We look forward to answering any questions that might provide additional insight into our firm, our methods, processes, or experience.