



**United Way California Capital Region  
Request for Proposal (RFP)  
Market Research**

**Release Date: June 27, 2013**

**Response to Request for Proposals Due: July 26, 2013 by 5 p.m.**

**Response to Request for Proposal Approved by UWCCR: August 30, 2013**

**Contract resulting from this RFP begins: September 1, 2013**

**Research conducted/finalized: November 15**

**Topline Research Results to UWCCR: November 25**

**Research Findings to UWCCR: December 15**

**Presentation of Research Findings to UWCCR Board of Directors: mid-January 2014**

**OUR MISSION:**

**To improve people's lives by mobilizing and integrating resources**

**OUR VISION:**

**To build stronger, healthier, more compassionate communities**

United Way California Capital Region (UWCCR)  
10389 Old Placerville Road  
Sacramento, CA 95827  
[www.yourlocalunitedway.org](http://www.yourlocalunitedway.org)  
Phone: 916-368-3000  
Fax: 916-368-3029

For more information, please contact:

Amber Murry  
Vice President of Marketing & Communications  
United Way California Capital Region  
916-856-3913  
[Amber.murry@uwccr.org](mailto:Amber.murry@uwccr.org)

**Overview of UWCCR:**

For 90 years, United Way California Capital Region (UWCCR) has actively worked to address the community's most pressing issues, now focusing on innovative solutions related to high school graduation rates, household financial stability and obesity. UWCCR's team of nonprofits, businesses, donors and volunteers are working together to provide positive, measurable results on these issues through UWCCR impact projects: STAR Readers, ŞenŞe-Ability and Fit Kids. Community members can give, volunteer and advocate in support of the causes they care most about, benefiting UWCCR and hundreds of nonprofits in Amador, El Dorado, Placer, Sacramento and Yolo counties. UWCCR is an independent, local affiliate of United Way Worldwide.

**Market Research Summary:**

UWCCR is looking to conduct market research to test awareness and trust of current donors, potential donors and key informants. UWCCR would also like to test specific messaging that would position UWCCR as a regional leader in improving our local communities and induce financial support from individuals, corporations, etc.

**Strategic Goals for Research:**

- Increased Revenue to UWCCR/impact projects (Education, Income and Health)
- Increased public identification of UWCCR as a regional leader in improving local communities.
- Assessing public belief that UWCCR is the trusted manager of their contributions (monetary and volunteer) to achieve the most good in our community.
- Testing potential messaging

**Requirements:**

If you or your firm is available and interested in performing this work, please provide a proposal with a description of how you propose to proceed with the project.

A qualifying proposal should also address the items below:

- Brief description of firm, contact person, address and telephone number. If sub consultants will be used in the project, include a description of the firm, including contact information.
- Three references who have knowledge of consultant's and/or sub consultant's work.
- Resumes of staff who will work on the project, including any sub consultants.
- Experience with large regional or statewide nonprofits that have robust fund development initiatives.

The contractor shall:

- Organize all preliminary work leading up to the research;
- Collaborate with UWCCR and UWCCR advertising firm to develop the questionnaire, methodology and discussion guide for research participants;
- Organize and lead all logistics, including coordination with UWCCR contact(s); and
- Conduct a presentation to the UWCCR board of directors reporting on the results and information learned and recommendations for potential message development.

**Challenges the UWCCR is facing that we hope the research will help us understand/solve so we can move forward:**

UWCCR has typically raised the majority of its funds from employees in workplace campaigns. As local workplaces have shrunk or gone away, UWCCR has seen a loss in revenue in the last few years. However, some industries (like private sector companies) are starting to rebound while the California State Employees Charitable Campaign has decreased in dollars and number of donors. UWCCR wants to maintain and increase its current donors, but also attract more donors outside the traditional workplace model.

In addition, UWCCR, along with United Ways across the country, has significantly changed from purely a fundraising organization to becoming a collective impact organization that is improving people's lives through Education, Income and Health. Instead of simply measuring success on how much we raise, UWCCR is also now measuring success on how many lives we improve and if our community is a better place to live. We would like to test current awareness and understanding of UWCCR, find out what messages would attract people to participate with UWCCR, and increase our public identification as a regional leader in the community.

**Target Demographics:**

- Current Donors (\$100 or more annually to UWCCR)
- Lapsed Donors (\$100 or more annually to UWCCR in the past)
- General Public with no history of a relationship with UWCCR, but do support other charities at a specific level (\$100 and above annually)
- Key informants (nonprofits, community and corporate leaders)

Note: Less than one year old contact information (address, phone, email) is available for some current donors. UWCCR could also provide contact information for key informants.

**Geographic Scope/Statistical Reliability:**

UWCCR serves the five counties of Amador, El Dorado, Placer, Sacramento and Yolo so we would want a statistically valid sample from each of these counties. We are suggesting a total sample size between 500 – 1,000 giving us a margin of error of +/- 4.0% at the 95% confidence interval. If you would like to propose a different sample size, you can also describe the statistical reliability of your proposed methods.

**Research methodology:**

UWCCR is open to different types of research methodology (focus groups, telephone/web surveys, etc) but we would like the firm to suggest which methodology they think would work best to accomplish the proposed goals.

**Budget:**  
\$40,000.

**Other Consideration:**

UWCCR does have secondary national research available from United Way Worldwide that UWCCR will want the chosen firm to use to provide gap analysis and comparisons to national data.