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Office of the City Clerk  
City of Marco Island, Florida



# Convergent

NONPROFIT SOLUTIONS

Better Fundraising. Better Results.

## Campaign Planning Study and Campaign Management Proposal

Prepared for:



Marco Island, Florida

### PRIMARY CONTACT

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Atlanta, GA 30339  
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[www.ConvergentNonprofit.com](http://www.ConvergentNonprofit.com)

# CONTENTS

Cover Letter .....	3
OUR CORE VALUES .....	4
THE CONVERGENT DIFFERENCE .....	4
➤ Market Leading Expertise .....	4
➤ Hands-On Campaign Management.....	4
➤ Low-Risk, Flexible Engagement Options .....	5
➤ Depth, Breadth, and Diversity of Resources .....	6
➤ Track Record .....	6
TAB 1 - Completed Forms .....	7
A. Declaration Statement .....	8
B. Vendor Information Form and W-9 Form .....	10
C. E-Verify Acknowledgement .....	12
D. Certification Re Debarment Suspension, Et Al. ....	13
E. Non-Collusion Certification .....	14
F. Sworn Statement Under Section 287.133 (3)(A) .....	15
G. Conflict of Interest Disclosure Form .....	17
H. Affidavit Attesting to Noncoercive Conduct et al. ....	18
I. Affidavit Re Prohibition on Contracting et al .....	19
J. Proposers Check List .....	20
TAB 2 - Convergent Experience .....	21
➤ Strong Florida Presence .....	21
➤ Public / Private Partnerships.....	21
➤ Environmental Protection and Nature Conservation Experience .....	22
➤ Extensive Grant and Funding Proposal Experience.....	22
TAB 3 - Convergent Key Members.....	23
TAB 4 – Approach to Scope of Services .....	28
OVERVIEW – CAMPAIGN PLANNING STUDY .....	28
IMPLEMENTATION PLAN – CAMPAIGN PLANNING STUDY .....	28
OVERVIEW & IMPLEMENTATION PLAN – CAMPAIGN MANAGEMENT .....	31
SUPPORT DURING CAMPAIGN.....	32

**TAB 5 - Location of Primary Office .....33**

**TAB 6 - Client References .....34**

**TAB 7 - Pricing Proposal .....36**

**CAMPAIGN PLANNING STUDY FEE AND EXPENSES .....36**

**CAMPAIGN MANAGEMENT FEE .....36**

**CAMPAIGN MANAGEMENT EXPENSES .....38**

**ENGAGEMENT TERMS .....38**

**TAB 8 - Other Information .....39**

**Certificate of insurance .....39**

**Convergent FLORIDA Experience .....40**





# Cover Letter

December 12, 2024

Angela Johenning, Purchasing and Risk Manager  
City of Marco Island  
50 Bald Eagle Drive  
Marco Island, FL 34145

Dear Angela:

On behalf of the entire Convergent team, I am delighted to submit a proposal in response to your RFP to provide fundraising consulting services.

Convergent is available and capable of performing all functions outlined in the RFP, including specifically the five tasks listed on pages 7-8. However, we propose fulfilling those tasks and meeting your overall needs within the structure of a Campaign Planning Study and Comprehensive Campaign. We propose to first conduct a Campaign Planning Study over a three-month timespan followed by a Comprehensive Campaign to secure cash, in-kind contributions, investment, grants, and multi-year funding commitments from individuals, corporations, foundations, and governmental entities. The length of time required to complete the campaign will depend on the scope of our engagement for campaign management services, which could range from 12 to 24 months.

There is no doubt that your proposed project constitutes a valuable and investable community asset, providing substantial positive impact to the community it serves. It certainly warrants significant investment from various stakeholders, including area businesses, foundations, and philanthropic individuals, as well as State and Federal support. However, a Campaign Planning Study is a prudent first step in preparation for a campaign. Among other things the study will serve as due diligence, obtain candid input and feedback on the proposed plans, identify any obstacles, inform campaign strategy, assess funding potential, identify potential leadership, cultivate support, and position the campaign for maximum success.

Should you have any questions about our proposal, please do not hesitate to contact me directly. I appreciate your consideration of Convergent Nonprofit Solutions.

Sincerely,

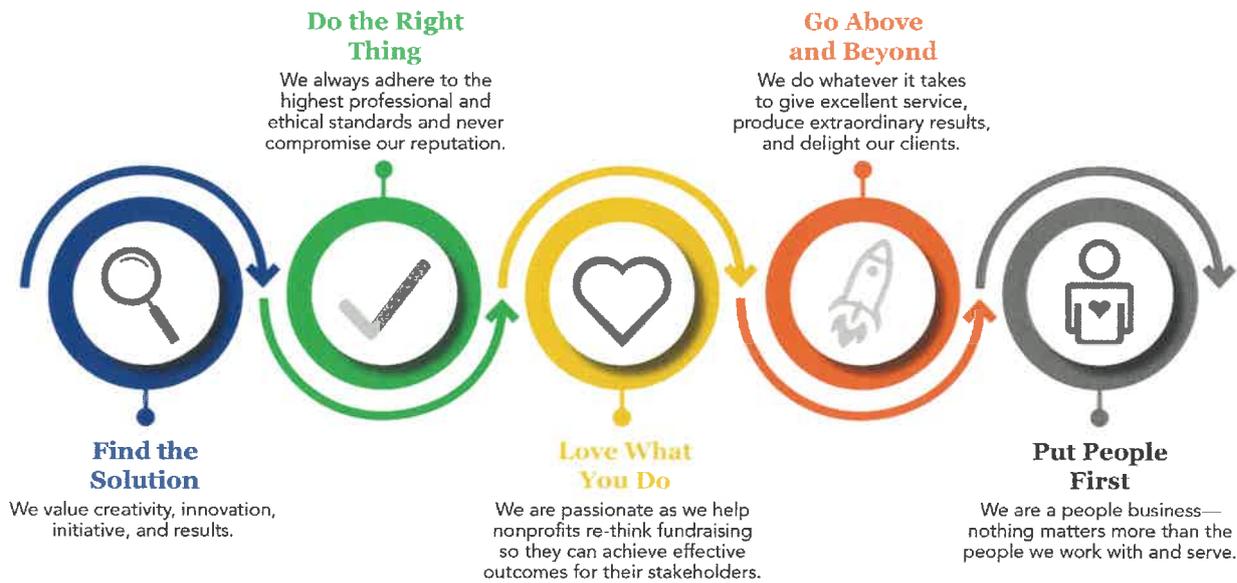
**Mark Bergethon** | Principal

**M:** (904) 307-3633

**EM:** [MBergethon@ConvergentNonprofit.com](mailto:MBergethon@ConvergentNonprofit.com)

Enclosure

## OUR CORE VALUES



## THE CONVERGENT DIFFERENCE

### ➤ Market Leading Expertise

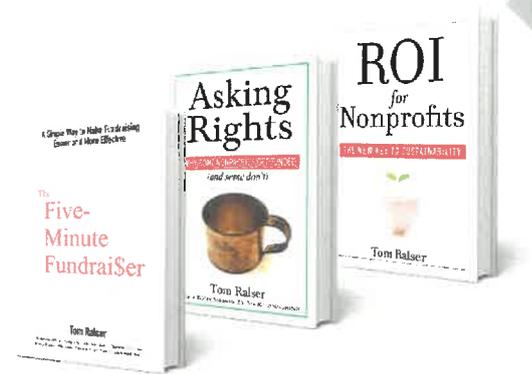
The Convergent team of experts has experience raising money for hundreds of organizations and initiatives in all 50 states and several foreign countries. The vast majority of Convergent’s business is focused on managing major fundraising campaigns for nonprofit organizations and public/private partnerships or conducting feasibility studies to position such campaigns for maximum success. Our campaigns have taken place in small, rural communities and major metropolitan areas. They have included community-based, countywide, regional, statewide, national, and international projects.

### ➤ Hands-On Campaign Management

We will do more than coach and counsel you on how to implement a campaign. We can manage the day-to-day details and do the heavy lifting, minimizing the burden on your team. When engaged for comprehensive management campaign, we attend each solicitation, make a consistent and professional presentation, and make “the ask” for money. We still need Board, staff, and volunteer support, but it is more of a door-opening and conversation-starting role. No previous fundraising experience is required from you because **we** can make the ask every time. Convergent can offer a more traditional periodic counsel arrangement if desired, but most of our clients opt for the value derived from the full-service comprehensive campaign management model.

### ➤ Investment-Driven Model™

Convergent’s Investment-Driven Model™ moves your donors from a “charity mindset” to one of investment in your organization. This broadens the funding base, shortens campaigns, and raises more money. Convergent Principal Tom Ralser, a Chartered Financial Analyst, pioneered the Investment-Driven Model™ as he worked with nonprofits on over 750 funding projects over the last 25 years. His work has ranged from national corporate sponsorships to statewide economic development campaigns to local human services efforts. He is also a published author of three widely-acclaimed fundraising guides – *The Five-Minute FundraiSer*, *Asking Rights: Why Some Nonprofits Get Funded (and some don’t)*, and *ROI for Nonprofits: The New Key to Sustainability*.



In short, *Convergent does not seek donations*; rather we present donors with investment opportunities in the nonprofit clients we represent. There is nothing “warm and fuzzy” about our fundraising: we talk about measurable outcomes and specific benefits to your investors. We also developed the Organizational Value Proposition®, or OVP, designed to answer tough questions from potential funders such as these:

- Why should I invest in your organization or project?
- What does your organization or project accomplish?
- How will my company or organization benefit?
- Can you quantify the impact you have?
- Will my investment allow your organization to build capacity?
- Why should I commit my resources to your organization or project vs. so many other worthy causes?

The OVP is used when nonprofits like yours realize the need to demonstrate that they make a difference. This realization usually occurs when funding is needed, and a campaign begins. The rigorous process of the OVP ensures that all of the tough questions are answered, the benefits are demonstrated, and the case for investment is clear – prior to asking for a financial commitment.

### ➤ Low-Risk, Flexible Engagement Options

Convergent does not take a cookie-cutter approach to campaign management. We recognize that one size does not fit all and strive to bring intelligence and creativity to the table and work *with* you in structuring sensible solutions. Every step of the way, Convergent will be committed to customizing solutions that meet your specific needs, circumstances, budget, and preferences.

With Convergent you are not locked into a standard, inflexible, long-term engagement. Our campaign planning study is a standalone engagement with no obligation to utilize us during the campaign. Our campaign engagements are month-to-month with easy termination so that you can assess our value as you go and discontinue at any time. In addition to the standard full-service management model, we offer reduced scope engagement options so that working with us does not have to be “all or nothing.”

We can even start out in one mode of engagement and scale up or down mid-course, as desired. We have had clients use us only for the study, only for the campaign, only for a portion of the campaign, start out in one engagement mode and switch to another, and even engage us for a la carte services or utilize us at daily or hourly rates for specific consultative tasks.

➤ **Depth, Breadth, and Diversity of Resources**

Convergent’s size is an asset. We are small enough that you will be dealing regularly and directly with the owners of the firm. But we are large enough—in fact, currently the largest in the economic and community development funding niche—that we can provide great depth, breadth, and diversity of personnel and resources to our clients. Our team of five principals, more than 30 consultants, and a half dozen support staff enables us to utilize specialized skill sets for specific functions, pool together vast expertise and experience to address challenging situations and ensure client projects don’t miss a beat if someone gets sick or needs to be replaced or supplemented for any reason.

➤ **Track Record**

This is really our strongest selling point. Convergent consistently delivers successful results for its clients. In every campaign our focus is not only on attaining goal, but doing so on time, under budget, and with a delighted client. In the pages that follow, we have listed client names, references, and testimonials to showcase our extraordinary level of client satisfaction. You can also [click here](#) to listen to our clients describe their experiences firsthand.





## TAB 1 - Completed Forms



IN WITNESS WHEREOF, WE have hereunto subscribed our names on this 10th day December, 2025 in the City of Orlando, in the State of FL.

Convergent Nonprofit Solutions, LLC

Firm's Complete Legal Name

Check one of the following:

- Sole Proprietorship
- Corporation or P.A.
- Limited Partnership
- General Partnership

Phone No. 800-886-0280

Fax No. N/A

Email SPetersen@ConvergentNonprofit.com

2451 Cumberland Parkway, Suite 3679

Address

Atlanta, GA 30339

City, State, Zip

BY: *Mark Bergethon*

Typed and Written Signature

Mark Bergethon

Principal

Title

**B. VENDOR INFORMATION FORM AND W-9 FORM**

**B. VENDOR INFORMATION FORM**  
RFP No. 2025-004

Company Name: Convergent Nonprofit Solutions, LLC  
*If a "DBA", please be sure this is indicated on W-9*

FEIN or SSN: 26-4789881 Service or Commodity Provided Fundraising Managment  
Mail Address: 2451 Cumberland Parkway, Suite 3679  
City: Atlanta State: GA Zip+4: 30339-6136

Remit Address: 2451 Cumberland Parkway, Suite 3679  
City: Atlanta State: GA Zip+4: 30339-6136  
Phone: 800-886-0280 Email: SPetersen@ConvergentNonprofit.com

Purchase Orders to be sent to: Angela Lyons  
Phone: 800-886-0280 Email: ALyons@Convergentnonprofit.com

Accounts Receivable Contact Name: Angela Lyons  
Phone: 800-886-0280 Email: ALyons@Convergentnonprofit.com

Other Contact Name: \_\_\_\_\_

**Vendor Instructions**  
If your company provides services performed on City property, you will also be required to submit an ACORD Insurance Certificate naming the City of Marco Island as an additional insured, along with a copy of the additional insured endorsement from your policy, prior to services being rendered.  
The City of Marco Island is exempt from the payment of Florida sales and use tax. Copies of the City's Sales Tax Exemption Certificate are available upon request to: [Ajohanning@cityofmarcoisland.com](mailto:Ajohanning@cityofmarcoisland.com)  
The City's payment terms are net 30 and all invoices/billing should be sent to: [accounts payable@cityofmarcoisland.com](mailto:accounts payable@cityofmarcoisland.com)  
A completed Form W-9 must be submitted with this Vendor Information Form.

Printed Name: Brian Abernathy Title: General Manager  
Vendor Signature:  Date: 12/10/2024

W-9 Form

Form **W-9**  
(Rev. March 2024)  
Department of the Treasury  
Internal Revenue Service

**Request for Taxpayer  
Identification Number and Certification**

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see Purpose of Form, below.

Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) <b>Convergent Nonprofit Solutions, LLC</b>		
	2 Business name/disregarded entity name, if different from above.		
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . . <b>P</b> Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions)	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____	
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . . <input type="checkbox"/>		(Applies to accounts maintained outside the United States.)
	5 Address (number, street, and apt. or suite no.). See instructions. <b>520 Sheritan Way</b>	Requester's name and address (optional)	
	6 City, state, and ZIP code <b>Smyrna, GA 30082</b>		
	7 List account number(s) here (optional)		

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see How to get a TIN, later.

Social security number									
				-					
or									
Employer identification number									
2	6	-	4	7	8	9	8	8	1

Note: If the account is in more than one name, see the instructions for line 1. See also What Name and Number To Give the Requester for guidelines on whose number to enter.

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person	<i>Angela Lyons</i>	Date	March 15, 2024

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**What's New**

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

### C. E-VERIFY ACKNOWLEDGEMENT

#### C. E-VERIFY RFP No. 2025-004

The City of Marco Island will not intentionally award publicly-funded contracts to any contractor who knowingly employs unauthorized workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324a(e) (Section 2274A(e) of the Immigration and Nationality Act ("INA")). The City shall consider the employment by any contractor of unauthorized aliens a violation of Section 274A(e) of the INA shall be grounds for unilateral cancellation of this Agreement by the City.

Vendor/Contractor shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

1. all persons employed by the Vendor/Contractor during the term of the Contract to perform employment duties within Florida; and
2. all persons, including subcontractors, assigned by the Vendor/Contractor to perform work pursuant to the contract with the Agency.

You may also sign-up for free webinars on E-Verify which are offered by the U.S. Department of Homeland Security. To see the schedule of webinars and register, click on the following link, which will take you to the US Department of Homeland Security's website: [E-Verify Webinars](#)

The Website for E-Verify is: <http://www.uscis.gov/e-verify>

(Vendor Signature)

12/10/2024

Date

Brian Abernathy  
Name and Title of Authorized Signee

Convergent Nonprofit Solutions, LLC  
Name of Corporation, Partnership, Trust, Etc.

**D. CERTIFICATION RE DEBARMENT SUSPENSION, ET AL.**

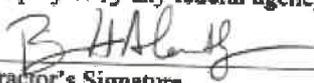
**D. CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY  
AND VOLUNTARY EXCLUSION  
RFP No. 2025-004**

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension (34 CFR, part 85, Section 85.510, Participant's Responsibilities).

"The Bidder certifies that, neither the firm nor any person associated therewith in the capacity of owner, partner, director, officer, principal, investigator, project director, manager, auditor, and/or position involving the administration of federal funds:

- (a) is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions, as defined in 49 CFR §29.110(a), by any federal department or agency;
- (b) has within a three-year period preceding this certification been convicted of or had a civil judgment rendered against it for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or public contract; violation of federal or state antitrust statutes; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c) is presently indicted for or otherwise criminally or civilly charged by a federal, state, or local governmental entity with commission of any of the offenses enumerated in paragraph 9(b) of this certification; and
- (d) has within a three-year period preceding this certification had one or more federal, state, or local government public transactions terminated for cause or default.

The Bidder certifies that it shall not knowingly enter into any transaction with any subcontractor, material supplier, or vendor who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this project by any federal agency unless authorized by the Florida Department of Transportation."

  
\_\_\_\_\_  
Contractor's Signature

Date 12/10/2024

Brian Abernathy, General Manager  
Name and Title of Authorized Signee

Convergent Nonprofit Solutions, LLC  
Name of Corporation, Partnership, Trust, Etc.

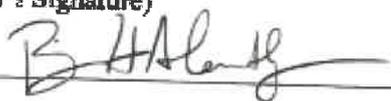
(SEAL)

**E. NON-COLLUSION CERTIFICATION**

**E. NON-COLLUSION CERTIFICATION**  
**RFP No. 2025-004**

The undersigned hereby certifies, to the best of his or her knowledge and belief, that on behalf of the person, firm, association, or corporation submitting the bid certifying that such person, firm, association, or corporation has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise take any action, in restraint of free competitive bidding in connection with the submitted bid. Failure to submit the executed statement as part of the bidding documents will make the bid non-responsive and not eligible for award consideration.

(Proposer's Signature)



Date 12/10/2024

Brian Abernathy, General Manager  
Name and Title of Authorized Signee

Convergent Nonprofit Solutions, LLC  
Name of Corporation, Partnership, Trust, Etc.

(SEAL)

**F. SWORN STATEMENT UNDER SECTION 287.133 (3)(A)**

**F. SWORN STATEMENT UNDER SECTION 287.133 (3)(a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES  
RFP No. 2025-004**

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted with Bid, Proposal or Contract No. 2025-004 for Grant Writing or Fundraising Services.

2. This sworn statement is submitted by Convergent Nonprofit Solutions, LLC  
(name of entity submitting sworn statement)  
whose business address is: 2451 Cumberland Parkway, Suite 3679, Atlanta, GA 30339

and its Federal Employer Identification Number (FEIN) is 26-4789881  
(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: \_\_\_\_\_)

3. My name is Thomas Raiser and my relationship to the entity named (please print name of individual signing) above is Principal Owner

4. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision or any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

5. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

6. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:

a. A predecessor or successor of a person convicted of a public entity crime; or

b. An entity under the control any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliated" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

c. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power

to enter into binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term

"person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

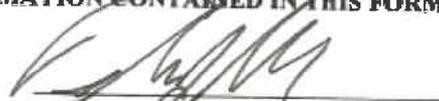
d. Based on information and belief the statement that I have marked below is true in relation to the entity submitting this sworn statement. (Indicate which statement applies.)

Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting the sworn statement on the convicted vendor list. (attach a copy of the final order)

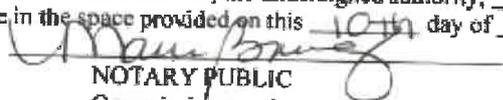
I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPHS 1-3 (ONE THRU THREE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT HIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

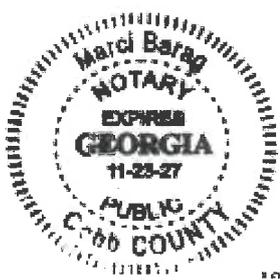
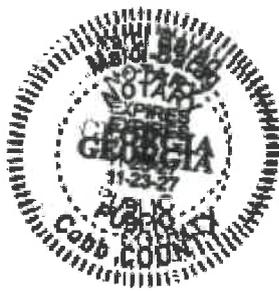
  
(Signature)

12/10/24  
(Date)

STATE OF Georgia  
COUNTY OF Cobb

PERSONALLY APPEARED BEFORE ME, the undersigned authority, Tom who, after first being sworn by me, affixed his/her signature in the space provided on this 10th day of Dec., 2024.

  
NOTARY PUBLIC  
Commission number:  
Commission expires: 11-23-27



## G. CONFLICT OF INTEREST DISCLOSURE FORM

### G. CONFLICT OF INTEREST DISCLOSURE FORM ITB #2025-001

The award of this contract is subject to the provisions of Chapter 112, Florida Statutes. All respondents must disclose within their submittal the name of any officer, director, or agent who is also an employee of the City of Marco Island.

The mere appearance of a conflict may be as serious and potentially damaging. Reports of conflicts based on appearances can undermine public trust in ways that may not be adequately restored even when the mitigating facts of a situation are brought to light. Apparent conflicts, therefore, should be disclosed and evaluated with the same vigor as actual conflicts.

(a) A public employee acting as a purchasing agent, or public officer acting in an official capacity, is prohibited from purchasing, renting, or leasing any realty, goods, or services for his or her agency from a business entity in which the officer or employee or his or her spouse or child owns more than a 5% interest. [Sec. 112.313(3), Fla. Stat.]

(b) A public officer or employee, acting in a private capacity, also is prohibited from renting, leasing, or selling any realty, goods, or services to his or her own agency if the officer or employee is a state officer or employee, or, if he or she is an officer or employee of a political subdivision, to that subdivision or any of its agencies. [Sec. 112.313(3), Fla. Stat.]

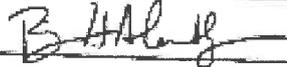
(c) A public officer or employee is prohibited from holding any employment or contract with any business entity or agency regulated by or doing business with his or her public agency. [Sec. 112.313(7), Fla. Stat.]

(d) A public officer or employee also is prohibited from holding any employment or having a contractual relationship which will pose a frequently recurring conflict between the official's private interests and public duties or which will impede the full and faithful discharge of the official's public duties. [Sec. 112.313(7), Fla. Stat.]

Please check one of the following statements and attach necessary documents if necessary:

X To the best of our knowledge, the undersigned firm has no potential conflict of interest due to any other clients, contracts, or property interest for this project.

The undersigned firm, by attachment to this form, submits information which may be a potential conflict of interest due to other clients, contracts, or property interest for this project.

Company Name Convergent Nonprofit Solutions, LLC  
Authorized Signature   
Name Brian Abernathy  
Title General Manager  
Date 12/10/2024

**H. AFFIDAVIT ATTESTING TO NONCOERCIVE CONDUCT ET AL.**

**H. AFFIDAVIT ATTESTING TO  
NONCOERCIVE CONDUCT FOR LABOR OR SERVICES**

Effective July 1, 2024, Section 787.06, Florida Statutes, a nongovernmental entity executing, renewing, or extending a contract with the City is required to provide an affidavit, signed by an officer or a representative of the nongovernmental entity under penalty of perjury, attesting that the nongovernmental entity does not use coercion for labor or services as defined in Section 787.06(2)(a), Florida Statutes.

By signing below, I hereby affirm under penalty of perjury that:

1. I have read Section 787.06, Florida Statutes, and understand that this affidavit is provided in compliance with the requirement that, upon execution, renewal, or extension of a contract between a nongovernmental entity and the City, the nongovernmental entity must attest to the absence of coercion in labor or services.
2. I am an officer or representative of Convergent Nonprofit Solutions, LLC, a nongovernmental entity.
3. Convergent Nonprofit Solutions, LLC does not use coercion for labor or services as defined in the relevant section of the law.

In the presence of:

Susan B. Petersen  
 Witness #1 Print Name: Susan B. Petersen  
Mika Dulin  
 Witness #2 Print Name: Mika Dulin

Under penalties of perjury, I declare that I have read the foregoing and the facts stated in it are true:

Thomas Raiser  
 Print Name: Thomas Raiser  
 Title: Principal Owner  
 Entity Name: Convergent Nonprofit Solutions, LLC

**OATH OR AFFIRMATION**

State of Georgia  
 County of Cobb

Sworn to (or affirmed) and subscribed before me by means of  physical presence or  online notarization, this 10th day of December, 2024 by Thomas Raiser (name of person) as Principal Owner (type of authority) for Convergent Nonprofit Solutions, LLC (name of party on behalf of whom instrument is executed).

Marc Barep  
 Notary Public (Print, Stamp, or Type as Commissioned)

- Personally known to me; or
- Produced identification (Type of Identification: \_\_\_\_\_)
- Did take an oath; or
- Did not take an oath



I. AFFIDAVIT RE PROHIBITION ON CONTRACTING ET AL.

L AFFIDAVIT REGARDING PROHIBITION ON CONTRACTING WITH ENTITIES OF FOREIGN COUNTRIES OF CONCERN

Pursuant to Section 287.138, Florida Statutes (which is expressly incorporated herein by reference), the City may not knowingly enter into a contract with an entity which would give access to an individual's personal identifying information if (a) the entity is owned by the government of a foreign country of concern; (b) the government of a foreign country of concern has a controlling interest in the entity; or (c) the entity is organized under the laws of or has its principal place of business in a foreign country of concern.

This affidavit must be completed by an officer or representative of an entity submitting a bid, proposal, or reply to, or entering into, renewing, or extending, a contract with the City which would grant the entity access to an individual's personal identifying information.

- 1. Convergent Nonprofit Solutions, LLC ("entity") does not meet any of the criteria in paragraphs (2)(a)-(c) of Section 287.138, F.S.

In the presence of:

Susan B. Petersen

Witness #1 Print Name: Susan B. Petersen

Mike Dulin

Witness #2 Print Name: Mike Dulin

Under penalties of perjury, I declare that I have read the foregoing and the facts stated in it are true:

Thomas Raiser

Print Name: Thomas Raiser

Title: Principal Owner

Entity Name: Convergent Nonprofit Solutions, LLC

OATH OR AFFIRMATION

State of Georgia
County of Cobb

Sworn to (or affirmed) and subscribed before me by means of [X] physical presence or [ ] online notarization, this 7th day of December, 2024 by Thomas Raiser (name of person) as Principal Owner (type of authority) for Convergent Nonprofit Solutions, LLC (name of party on behalf of whom instrument is executed).

Marci Barag

Notary Public (Print, Stamp, or Type as Commissioned)

- [X] Personally known to me; or
[ ] Produced identification (Type of Identification: )
[X] Did take an oath; or
[ ] Did not take an oath



## J. PROPOSERS CHECK LIST

City of Marco Island RFP #2025-004

Page 20 of 24

### J. PROPOSERS CHECK LIST

**IMPORTANT:** Sign in the spaces indicated and submit with your proposal.

Proposer should check off each of the following items as the necessary action is completed:

1. The RFP has been signed.
2. Any required documents, qualification statements, etc. have been included.
3. Any addendum (if any) have been signed and included.

Convergent Nonprofit Solutions, LLC  
Company Name

B. H. Landry  
Signature & Title

Date: 12/10/2024

## TAB 2 - Convergent Experience

Convergent is a national fundraising consulting firm comprised of dozens of the most experienced nonprofit experts in the country. We specialize in managing campaign planning studies and major funding campaign campaigns for nonprofit organizations and community initiatives across the United States. Although Convergent flexibly customizes fundraising solutions to meet our clients' needs, we primarily provide comprehensive campaign management services that minimize the burden on your staff and professional solicitations that minimize the burden on your Board and volunteers.

Convergent is in its 15th year of operating in its current form as a result of a merger of smaller consultancies in 2009. Each of the five principals has been in the industry since the 1990s. Our team of over 30 professionals is comprised of some of the best, brightest, and most passionate fundraising experts in the industry. Included are former attorneys, economists, professors, corporate CEOs, nonprofit executive directors, public officials, and other highly accomplished individuals. There are many professional certifications among our team members, including CEcD (Certified Economic Developer), CCE (Certified Chamber of Commerce Executive), IOM (Institute of Organizational Management), CFA (Certified Financial Analyst), CFRE (Certified Fundraising Executive), and many others. Our deep and diverse resources and talent provide incredible value to each client with which we work.

### ➤ Strong Florida Presence



Although Convergent is a national firm headquartered in Atlanta, we have a very strong Florida presence. Nearly a quarter of our team members are Florida-based, including one of the firm's Principals and the top two management supervisors who oversee all of our field personnel. We have provided fundraising services to more than 50 Florida non-profits and public/private partnerships. Refer to a representative graphic chart of several organizations we've worked with in Florida, later in the back of this document.

### ➤ Public / Private Partnerships

We are frequently hired by government agencies for community projects or initiatives. **Sample clients include** the City of Fort Madison and the Fort Madison Marina (IA), the City of East Grand Forks Parks and Recreation (MN), Forest City for Forest City Public Library (IA), and Siler City for Siler City Aquatic Center (NC).

Additionally, Convergent does more economic development fundraising than any firm in the country and those projects are almost always public / private partnerships. Some of the community improvement initiatives within our current economic development **clients include** Area Development Partnership (MS), Hampton Roads Alliance (VA), Community Improvement Corporation of Springfield (OH), Lakeshore Advantage (MI), and the Craven 100 Alliance (NC).



➤ **Environmental Protection and Nature Conservation Experience**

Some of the projects we have worked on that have a strong environmental protection or nature conservation component include studies or campaigns for Alabama Wildlife Federation (AL), Tybee Island Marine Science Center (GA), Jekyll Island Foundation (GA), Pennsylvania Association for Sustainable Agriculture (PA), Rodale Institute (PA), Indian River Land Trust (FL), Alabama NaturePlex (AL), and many different animal shelters.

➤ **Extensive Grant and Funding Proposal Experience**

Over the course of the hundreds of campaigns we have managed we have collectively made many thousands of funding proposals to corporations, high net worth individuals, foundations, and government entities. These proposals and the funding received in response typically range from four to seven figures. Our campaigns typically range from \$1 million to \$50 million in terms of overall goal and funding raised.

## TAB 3 - Convergent Key Members

Convergent takes a team approach to client engagements. We anticipate assigning the team below to your project. **Mark Bergethon** will serve as your firm liaison/account executive. Based on timing and fit, one of our consultants will be assigned as the day-to-day manager who will provide the proposed consulting services under the supervision and direction of **Rex Otey**. On-site project leadership will be determined by the scope and scale of a contract. **Tom Ralsler** is an advisor as we work on Convergent's Investment-Driven Model™ and the Organizational Value Proposition®. Others may be added to the team as warranted.





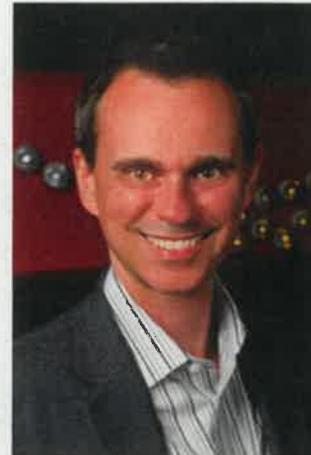
## Mark Bergethon

### PRINCIPAL

As a founding Principal of Convergent Nonprofit Solutions, Mark focuses on empowering nonprofits to accomplish more for the communities and constituencies they serve by dramatically increasing their financial resources. He is recognized as one of the leading national experts in funding nonprofit organizations and community initiatives through fundraising campaigns.

Mark has managed and consulted on fundraising campaigns for a broad array of nonprofits including schools, community colleges, museums, hospitals, women's and children's services, workforce development organizations, associations, arts and culture organizations, Boy Scout councils, historic theatres, human services organizations, community foundations, YMCAs, animal shelters, hospices, social service nonprofits, community centers, chambers of commerce, and economic development corporations.

 <https://www.linkedin.com/in/markbergethonconvergent/>



### Summary of Experience

- Directed and provided oversight for more than 80 feasibility studies and fundraising campaigns for organizations nationwide, raising hundreds of millions of dollars for a wide variety of nonprofits.
- Conducted dozens of successful high-profile six, seven, and eight-figure funding requests.
- Led workshops and participated in panel discussions at more than a dozen statewide, regional, national, and international conferences and events for economic development professionals, chamber executives, and nonprofit leaders.
- Authored two legal reference books and numerous articles on fundraising.
- Earned a Bachelor's degree in Political Science from Emory University and a law degree from the University of Georgia. Member of the bar in both Georgia and Florida.

To learn more about Convergent's fundraising services, visit us at [www.ConvergentNonprofit.com](http://www.ConvergentNonprofit.com)

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## Rex Otey

### SENIOR DIRECTOR OF CLIENT SERVICES

Rex has generated over \$100 million for various nonprofit organizations over his 30+ year career. He has led development efforts for churches, nonprofits, and universities.

During his career, he has had the opportunity to work with over two dozen college, university, and private college-preparatory institutions, with responsibilities ranging from directing capital and comprehensive campaigns to the overhaul of development operations. For instance, he reworked Catawba College's (NC) annual fund program, exceeding their \$1.2 million goal each year, and energized Rockford College's (IL) annual fund, doubling the four-year campaign goal and raising over \$10 million.

As a chief development officer and career fundraiser, Rex has met the challenges of managing campaigns, annual funds, major gifts, planned giving, alumni/parent programs, and large teams of volunteers. His energetic, innovative approach and focus on genuine relationship building equip him to revitalize existing programs and create new ones, continually exceeding fundraising goals throughout his career.

Rex's talents are suited for his role, interfacing with Convergent clients and assisting the Project Directors who serve them.

 <https://www.linkedin.com/in/rexotey>



### *Summary of Experience*

- Managed Catawba College's *Our Catawba: The Forward Path* campaign, which raised \$46 million in its first three years.
- Successfully managed campaigns, strategic planning, board development, and executive search for universities and statewide and regional nonprofits and ministries.
- Revitalized Heartland Community Church's \$16 million *Making Ripples* campaign.
- Clients have included Catawba College, Johnson Wales University, Cabrini University, Trine University, and Urbana University.
- Bachelor of Science in Business Management, Alderson-Broadus College.
- Masters in Education Administration, West Virginia University.

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## Tom Ralsler, CFA

PRINCIPAL, Director of The Outcomes Lab

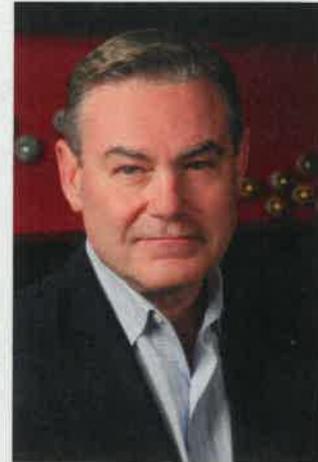
Tom began revolutionizing the fundraising world in 1994, when he was asked by funders to justify the investment in an economic development effort in Colorado. In the 30 years since, he has worked with organizations of all kinds, from chambers of commerce to religious organizations, national museums to rural health networks, and local youth organizations to international research institutes. He pioneered the concept of applying return on investment (ROI) principles to nonprofit fundraising, and fundraisers have described his work as the “silver bullet” that justifies larger investments in nonprofit organizations.

Hundreds of organizations have benefited from Tom’s focus on outcomes, funder motivations, and the translation of value into language that today’s nonprofit funders appreciate, and sometimes demand. As a Chartered Financial Analyst (CFA), he built the foundation for his *Investment-Driven Model™* of campaigns, his *Organizational Value Proposition®* method of demonstrating value, and the well-known *Investable Outcomes™* framework. These are all widely used by corporations, foundations, and individuals as confirmation that the nonprofits in which they invest are truly delivering outcomes with value. His specialty of utilizing for-profit concepts and methods in the nonprofit world has helped nonprofits raise over an estimated \$2.1 billion in the 30 years he has worked with them.

Tom is a frequent and highly acclaimed speaker, addressing topics about attracting new funders, outcome-based sustainability planning, and delivering value to investors.



<https://www.linkedin.com/in/tomralsler>



### Summary of Experience

- Personally involved in over 750 nonprofit funding projects in all 50 states and internationally from Brazil to China.
- Authored the best-selling books *ROI for Nonprofits: The New Key to Sustainability*, *Asking Rights: Why Some Nonprofits Get Funded (and some don't)*, and *The Five-Minute Fundraiser*.
- Holds the Chartered Financial Analyst (CFA) designation, ranked by Economist magazine as the “gold standard” for investment analysis.
- Session leader and/or keynote speaker at dozens of conferences throughout the nonprofit sector and the country.
- Founding Director of Western Colorado Bureau of Economic and Business Research at Colorado Mesa University, where he was a tenured professor.
- Earned a BS in Marketing from Illinois State University and a MS in Finance from the University of Utah.

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## Tiara Owens

### CLIENT SUCCESS MANAGER

Tiara Owens is a proven strategic client success manager specializing in elevating customer satisfaction, fostering strong client relationships, and aligning internal teams with client goals. Over the years, Tiara has honed a commitment to excellence and an “exceeding expectations” standard to drive business success and long-term customer loyalty in her project management and client engagement roles.

With a solid foundation in the event management industry, Tiara has successfully led projects for various organizations with exceptional service, smooth execution, and high levels of client satisfaction. Other experience includes serving as a project manager for marketing campaigns and feasibility studies. In one role, she delivered six projects with a combined budget exceeding one-half million dollars, achieving a 66% budget efficiency, and demonstrating her ability to maximize resources, deliver value, and effectively managing costs.

Tiara excels in fostering collaboration across teams, understanding that strong communication is essential for achieving project goals. She is a Project Management Professional (PMP) and a Certified ScrumMaster (CSM) along with her education degrees from Florida International University (MS-Hospitality Management) and East Carolina University (BS-Organizational and Interpersonal Communication). Driven by a passion for operational efficiency and outstanding service delivery, Tiara is a key asset to the Convergent client services team.

 <https://www.linkedin.com/in/1tiaraowens>



### *Summary of Responsibilities*

- Provides support with client-facing operational processes and oversight of the technology services.
- Serves as the point of contact for clients throughout project engagements, providing onboarding and training as needed.
- Is a liaison between various departments by providing best practice materials, communications, reporting, and data collection.
- Monitors project progress and elevates potential concerns.
- Creates and proofreads client facing material, reports, and other documents to ensure consistency in formatting and branding.
- Provides overall support to the implementation of Convergent’s various growth initiatives.

To learn more about Convergent’s fundraising services, visit us at [www.ConvergentNonprofit.com](http://www.ConvergentNonprofit.com)

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# TAB 4 – Approach to Scope of Services

## OVERVIEW – CAMPAIGN PLANNING STUDY

Conducting a Campaign Planning Study is the first step in launching any major, successful fundraising campaign. It is a cultivation step, not a solicitation step. In the fundraising world, we have a saying: *“If they help us write the plan, they will help us underwrite the plan.”*

It is unrealistic to assume that the very first time a meeting is held, the prospect will immediately want to invest in your organization. This is an opportunity to converse, interact, and appreciate your prospect’s opinion. This is what allows the program of work being tested to ultimately become *their* program of work. This ownership of the program or project leads to more substantial dollars raised.

The process we implement is based on a combination of decades of experience and the results of extensive objective testing. Ultimately, we position our clients’ fundraising campaigns for success while also providing a wealth of information from which to make other crucial organizational decisions. Through a Convergent campaign planning study, we will:

- ESTABLISH** preliminary measurable goals for your projects and programs.
- ASSESS** community support for your proposed plans.
- MEASURE** funding potential among likely investors.
- IDENTIFY** desired priorities among your organization's constituency.
- OBTAIN** key constituency feedback on your organization's performance.
- DETERMINE** a feasible fundraising goal.
- COLLECT** prospect information that will be useful during the fundraising campaign.
- GARNER** valuable confidential insight from top community leadership.
- PROVIDE** a risk/reward analysis for launching a major campaign.
- BUILD** awareness of the planned fundraising campaign.
- SYNTHESIZE** diverse viewpoints into a core consensus and often a mandate.
- CONDUCT** appropriate due diligence for your proposed plans.
- POSITION** the planned campaign for success.
- MAKE** specific recommendations on whether and how to launch a successful campaign.

## IMPLEMENTATION PLAN – CAMPAIGN PLANNING STUDY

Convergent facilitates further development and packaging of your plans, as needed. When complete, Convergent oversees the mailing to a targeted number of prospective funding sources. Included in this mailing is a letter summarizing the importance of your project and requesting that each recipient schedule an interview

to provide candid input and feedback. One week following this mailing, an assigned member of your team will contact recipients to schedule appointments. Convergent provides guidance and training for this process.

The Convergent team conducts three weeks of interviews with top business and community leaders, foundation directors, public officials, and individual sources of philanthropic support. Interview targets are the result of collaborative discussion identifying your contacts and known supporters, along with our research and analytics with access to the Foundation Directory (identifying foundations and government sources currently donating/investing in similar programs and projects.)

### Top 15 Areas of Focus During Each Interview

1. Knowledge and understanding of your mission and objectives.
2. Assessment of your performance, strengths, and suggested areas for improvement.
3. Overall evaluation/rating of your proposed plan and feedback on individual components.
4. Perceived value of the project.
5. Opinions about your constituency's willingness and ability to fund the plan.
6. Brainstorm of top prospective investors.
7. Indication of the interviewee's willingness to invest and range of potential investment.
8. Variables impacting decision.
9. Decision-making process and timeline.
10. Potential changes that could induce increased investment.
11. Brainstorm of most effective campaign leaders.
12. Inquiry into the interviewee's willingness to serve as a leader.
13. Knowledge of other campaigns that could impact your efforts.
14. Factors that could be barriers to success.
15. Additional insights and guidance to help position a campaign for success.

These confidential interviews will verify and/or modify the proposed plans as a reality check, determine a challenging yet realistic goal assessment, and start building consensus by marketing the benefits of the planned programs. The study also gauges the funding constituency's perception of your organization, identifies potential campaign leadership, and provides guidance on governance and oversight functions.

After the interview phase, Convergent analyzes the results and develops a comprehensive report with:

- Observations, findings, and conclusions
- Aggregated response data
- Guidance on whether and how to proceed
- Determination of an appropriate fundraising goal
- Recommended campaign plan and timeline
- Roadmap for campaign success, including specific actions steps to move forward

Although we work with you to construct a study plan that meets your needs, circumstances, and preferences, we anticipate implementing the following:

## WEEKS 1-4

### Pre-Interview Phase Preparation

- Facilitate the development of a multi-year plan of work
- Design the questionnaire/script for the interviews
- Produce an investment table
- Determine interview targets
- Develop interview request letter to be mailed to interview targets
- Provide guidance in scheduling interviews

## WEEKS 5-7

### Interview Phase

- Conduct confidential face-to-face and/or virtual interviews with selected top prospects
- Conduct supplemental phone interviews
- Obtain input and feedback from prospective investors
- Elicit indications of potential financial commitment
- Build consensus for support

## WEEKS 8-10

### Expert Analysis and Report Presentation

- Synthesize and analyze all information, input, and data
- Determine findings, options, and recommendations
- Develop comprehensive written report
- Present findings, options, recommendations, and written report
- Establish campaign goal, plan, and timeline



“Convergent has **strong values** and a strong understanding of the fiscal responsibility that we want to maintain through this project. Working with them wasn’t necessarily about how to raise the most money possible knowing that that’s how they get paid. It was truly about understanding what was **best for the community and how to be a solution for that.**”

**Reid Huttunen, Parks & Recreation Superintendent**  
City of East Grand Forks | East Grand Forks, MN



“We talked to a few different consulting firms and really felt a connection with Convergent from the start. They added structure to our planning study and credibility to our fundraising campaign. This was a new thing for us, and our partnership with Convergent was a good one. They helped us go through the process painlessly. **The day-to-day of the study and campaign would have been hard to manage without them.** They represented us well.”

**Christle Ross, Executive Director**  
Foothills Area YMCA | Seneca, SC

## OVERVIEW & IMPLEMENTATION PLAN – CAMPAIGN MANAGEMENT

Convergent provides a variety of campaign management options and can flexibly customize a package to suit your specific situation. These decisions are usually better made *after* the study but we can forge a seamless ongoing engagement in your discretion. When our firm is engaged for comprehensive campaign management, the Convergent team plans, organizes, and implements the entire campaign process, assigning a dedicated project director and provides supplemental support from other specialists. We minimize the burden on client staff by managing the day-to-day details of the campaign. We anticipate implementing the following action steps:

### QUIET PHASE



### PUBLIC PHASE



## SUPPORT DURING CAMPAIGN

The extent of needed support from your staff and board during the campaign varies depending on the scope of Convergent’s campaign management role, illustrated below for a comprehensive, full-service campaign.

### STAFF

- Dedicated campaign administrative support for the Campaign Director and Campaign Leadership Team
- Weekly one-hour meeting with top staff to review progress, strategize, plan, approve documents, etc.

### BOARD

- Pledges committed relatively early in the Quiet Phase to demonstrate strong internal support prior to going public
- Active and enthusiastic comments publicly and privately in support of campaign efforts
- Attendance at major public campaign events like Kick-Off and Victory Celebration

In addition to staff and board support, we strategically recruit a volunteer Campaign Leadership Team. Roles and duties for each position are spelled out clearly as part of the recruitment process. Our comprehensive approach minimizes the burden on campaign volunteers. We engage campaign leaders strategically and sparingly, focusing their time and attention on a handful of tasks providing the most significant impact on campaign results.

For example, most of the money in any capital campaign comes from a relatively small number of investors or grantors. We enlist the strategically appropriate volunteer leader or staff person as applicable to accompany us on these asks, or to assist us in these investment proposal or grant requests, to maximize results. Even in those instances, the volunteer (or staff) role is usually limited to establishing rapport and credibility, exerting influence, and leading by example. Other typical leadership responsibilities include letter signing, appearing in a campaign brochure, attending strategy meetings, “opening doors” to contacts, and similar activities.

*The City of*  
**MARCO ISLAND.**  
*Florida*

## TAB 5 - Location of Primary Office

Although our official headquarters is in Atlanta, the Convergent team works remotely as a virtual team. One of the Principal owners, Mark Bergethon, resides in Orlando (1100 Munster Street, Orlando, FL 32803 – 904-307-3633) and provides Convergent with an Orlando base. Additional Project team member Rex Otey resides in Sarasota. Other staff will be named upon acceptance of this proposal and may or may not reside in Florida.

The miles between 1100 Munster Street in Orlando to the City of Marco Island City Hall at 50 Bald Eagle Drive in Marco Island is approximately 213 miles, as quoted on MapQuest. The distance from Rex Otey's home in Sarasota is 131 miles.



"The strategy and support offered by Convergent helped our Board expand its vision for the Foundation, which in turn helped to refocus and redefine our organization's impact in our community. The methodology behind their capital campaign process not only helps to raise more money in the immediate, but it also **builds best practices for long-term investor relations and lays groundwork for the success** of future funding initiatives."

**Dion Davis, Former Executive Director**  
Jekyll Island Foundation | Jekyll Island, GA

## CENTRAL FLORIDA FOUNDATION

**"Convergent has captured the convergence of market changes with great clarity!** In the new philanthropic marketplace, 'need' is no longer the value proposition of aspiring nonprofits."

**Mark Brewer, President & CEO**  
Central Florida Foundation | Orlando, FL

## TAB 6 - Client References



Mark Litten, Vice President, Economic Development  
**Putnam County Economic Development**  
Palatka, FL  
614.648.5015 | [mark@chamberpc.com](mailto:mark@chamberpc.com)

Convergent recently completed a campaign to fund the community's five-year strategic plan for economic, workforce, and community development, raising \$3.35 million on a \$2 million goal.



Dennis Fraise, President & CEO  
**Lee County Economic Development Group**  
Montrose, IA  
319.753.0690 | [DFraise@leecountyedg.com](mailto:DFraise@leecountyedg.com)

We conducted a community-based planning study to raise gap funding for developing and rejuvenating the marina on the Mississippi riverfront in Fort Madison, Iowa. The campaign was targeted to raise \$1.75 million to supplement public and private sector commitments to fund the total \$12.7 million project cost. At conclusion, over \$3 million was raised in the campaign with additional pending financial commitments and a \$1 million grant applied for.



Reid Huttunen, Parks & Recreation Superintendent  
**City of East Grand Forks**  
Grand Forks, MN  
218.399.3388 | [RHuttunen@egf.mn](mailto:RHuttunen@egf.mn)

Convergent conducted a campaign planning study to test a \$10 million capital campaign for a variety of projects, including modernizing ice arenas and replacing a field with synthetic turf. Although we did not recommend proceeding with the campaign as then conceived, we made a variety of highly customized recommendations to provide a constructive path forward and position the City for future capital campaign success.



Jeff Pickering, President & CEO  
**Indian River Community Foundation**  
 Vero Beach, FL

772.492.1407 | [jeff.pickering@ircommunityfoundation.org](mailto:jeff.pickering@ircommunityfoundation.org)

Convergent has recently completed work to manage a \$50 million campaign to secure permanent philanthropic funding addressing a broad variety of community needs.



Christle Ross, Executive Director  
**Foothills Area YMCA**  
 Seneca, SC

864.962.4049 | [cross@y4all.org](mailto:cross@y4all.org)

Convergent conducted a Feasibility Study and provided Capital Campaign management services in 2018 to help fund the construction of an \$8 million new facility. By 2023, the Foothills Y was bursting at the seams, proposing a Phase II 50,000 square foot expansion. We completed a new Feasibility Study and are now almost finished managing the campaign for this \$15 million expansion which also incorporated state and federal funding and a USDA loan.



"When it came time for our economic development council to increase our funding resources, we selected Convergent Nonprofit Solutions because of their fundraising process, built on an ROI model, and I trusted them. Not only did we surpass our target goal of \$2 million, but we also achieved **amazing success** by securing \$3.35 million to fund the implementation of our new 5-year Strategic Action Plan! We couldn't have achieved this level of success without the **talented team** at Convergent!"

**Mark Litten, Vice President – Economic Development**  
 Putnam County Chamber of Commerce | Palatka, FL



"Convergent gave us **deep insights** that informed our plans for moving forward. They really work with nonprofits as a **trusted advisor**."

**Jeff Pickering, President & CEO**  
 Indian River Community Foundation | Vero Beach, FL

# TAB 7 - Pricing Proposal

## CAMPAIGN PLANNING STUDY FEE AND EXPENSES

The comprehensive management fee for the Campaign Planning Study outlined above is **\$37,500**, plus expenses. The scope of the study can be adjusted as desired, with a corresponding cost adjustment.

Out-of-pocket travel expenses such as lodging, car rental, and airfare are reimbursable at actual cost. Per diem while on-site or traveling, is at the current GSA Per Diem rate. In-kind or discounted arrangements for items such as lodging or on-site transportation often decrease these expenses considerably. No expenditures are made without your prior budget approval.

We typically regard the Campaign Planning Study as a stand-alone engagement but could fashion a seamless study/campaign engagement if preferred. You may retain Convergent for the study without the obligation to engage our firm during the campaign. All pricing included in this proposal is guaranteed for 90 days and then subject to change.

## CAMPAIGN MANAGEMENT FEE

Convergent can develop a custom and cost-effective management solution scaled to the magnitude of your campaign and the extent of desired Convergent involvement. Below are management options for you to consider based on your needs and budget. If one of these options does not meet your expectations and needs, we can craft and price a custom option that does. Decisions are typically made about engaging Convergent for a campaign and in what capacity after the study and based on information collected via the study interviews. All pricing included in this proposal is guaranteed for 90 days and then subject to change.



★ Designed by TownMapsUSA.com

**All levels of Comprehensive Campaign Management include:**

- Dedicated project director to serve as point person on your campaign, along with support of the Convergent team, to manage day-to-day efforts.
- Enlistment, training, and guidance of campaign cabinet and leadership.
- Guidance in development and determination of solicitation amounts for campaign prospect list, to include foundation research, and wealth screening for individual prospects.
- Expert guidance in developing a Case for Investment and campaign collateral to conduct professional solicitations.

Levels of engagement are tiered based on the degree of activity the Convergent team plays in conducting solicitations and follow up:

**FULL SERVICE**  
\$27,500/month

- Convergent director will manage all day-to-day activities of your fundraising efforts from start to finish.
- Convergent will lead solicitation of all prospects and enlistment of all campaign leaders.
- Full availability for on-site meetings, typically on site 3-4 visits per month, as needed to drive successful campaign implementation.

**SHARED SOLICITATION**  
\$16,500/month

- Convergent director will direct all day-to-day activities of your fundraising efforts from start to finish.
- Rolling availability for onsite meetings, typically 2 visits per month.
- Solicitations and leadership enlistment duties will be shared between Convergent and the staff/volunteer team.

**CAMPAIGN COUNSEL**  
\$12,500/month

- Convergent director guides strategy and implementation of campaign from start to finish.
- Provide leadership for campaign cabinet meetings.
- Staff and volunteers conduct leadership enlistments and solicitations.
- Duration depends on degree of staff and volunteer involvement.
- Director typically on site once per month.

The varied levels of engagement should be understood to correlate to the level of time required by staff, board, and volunteers. The greater and higher the level of engagement from Convergent’s team, the lower the demand will be for staff and volunteers. Major fundraising campaigns are a team sport with staff, volunteers, board, and counsel all playing critical roles, but there is no substitute for the relational equity held by your staff and board.

## CAMPAIGN MANAGEMENT EXPENSES

Out-of-pocket expenses such as lodging, car rental, and airfare are reimbursable at actual cost. Per diem, while on-site or traveling is at the current GSA Per Diem rate. In-kind or discounted arrangements for items such as lodging or on-site transportation often decrease expenses considerably. No expenditures are made without prior budgeted approval.

You pay directly for any other necessary campaign-related expenses, including on-site administrative support, office supplies, postage, printing, events, collateral production, etc. There may be opportunities to significantly reduce these expenses using existing resources and the procurement of in-kind contributions.

## ENGAGEMENT TERMS

Convergent's monthly campaign fee is typically due at the onset of each month of service but could be billed quarterly to accommodate your preferred terms. We work month-to-month with a 30-day termination notice. We can begin in one mode of engagement and scale up or down our involvement mid-course, as needed.



“

**We had a very unusual fundraising need: endowing the continuation of fireworks in our community over the 4th of July (a 136-year tradition spanning generations) in conjunction with two other events, which combined, bring in \$10 million to our community during that weeklong holiday period. Convergent rose to the challenge of this unique endowment campaign, also working with our local community foundation. Our initial goal of \$1 million was attained in six months. We revised the goal to \$1.2 million, which we also met. Convergent was a major reason for our success, with their professional counsel and outstanding personnel to guide us. I highly recommend them to meet your organizational needs, from a feasibility study to a comprehensive campaign.”**

TIM COFFEY, FORMER EXECUTIVE DIRECTOR  
Clear Lake Area Chamber of Commerce  
Clear Lakes (IA)

# TAB 8 - Other Information

## CERTIFICATE OF INSURANCE

Convergent can provide requested insurance coverage levels upon the acceptance of this proposal.

		<b>CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YYYY) 07/03/2024			
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.							
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).							
PRODUCER Liberty Mutual Insurance PO Box 188065  Fairfield OH 45018			CONTACT NAME: PHONE (A/C, No. Ext): 800-962-7132 FAX (A/C, No.): 800-645-3666 E-MAIL ADDRESS: BusinessService@LibertyMutual.com		INSURER(S) AFFORDING COVERAGE INSURER A: Ohio Security Insurance Company NAIC # 24082		
INSURED Convergent Nonprofit Solutions 2451 Cumberland Pkwy Se Ste 3679  Atlanta GA 30339			INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:				
<b>COVERAGES</b>		<b>CERTIFICATE NUMBER: 0138079516</b>		<b>REVISION NUMBER: 2016-03</b>			
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.							
INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	X	X	ELSS7230759	03/27/2024	03/27/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (if 2 occurrence) \$ 300,000 MED EXP (Any one person) \$ 15,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (2 accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		Y/N	N/A			PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  ***Proof of Insurance***							
<b>CERTIFICATE HOLDER</b> Convergent Nonprofit Solutions  2451 Cumberland Pkwy Se Ste 3679  Atlanta GA 30339				<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  Curtis Luken			

ACORD 25 (2016/03)

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# Convergent Nonprofit Solutions

## is the Go-To Fundraising Firm in Florida

Don't take our word for it. Contact any of these clients across Florida and ask about their experience working with us.

- 1 The Lifeboat Project  
APOPKA, FL
- 2 Bradenton Area EDC  
BRADENTON, FL
- 3 Coral Gables Chamber of Commerce  
CORAL GABLES, FL
- 4 Early Head Start of Miami-Dade Monroe  
CORAL GABLES, FL
- 5 Early Learning Coalition of Miami-Dade Monroe  
CORAL GABLES, FL
- 6 Jack & Jill Children's Center  
FORT LAUDERDALE, FL
- 7 Hibiscus Children's Center  
FORT PIERCE, FL
- 8 Cade Museum for Creativity & Invention  
GAINESVILLE, FL
- 9 Gainesville Area Chamber  
GAINESVILLE, FL
- 10 Jacksonville Historic Naval Ship Assoc.  
JACKSONVILLE, FL
- 11 Florida Polytechnic University  
LAKELAND, FL
- 12 Beacon College  
LEESBURG, FL
- 13 The Shelter of Abused Women & Children  
NAPLES, FL
- 14 Ocala/Marion County Chamber  
OCALA, FL
- 15 Boys & Girls Club of Central Florida  
ORLANDO, FL
- 16 Freedom Ride  
ORLANDO, FL
- 17 Homeless Services Network of Central FL  
ORLANDO, FL
- 18 IDignity  
ORLANDO, FL
- 19 Michelee Puppets  
ORLANDO, FL
- 20 Orlando Museum of Art  
ORLANDO, FL
- 21 Pet Alliance of Greater Orlando  
ORLANDO, FL
- 22 Children's Home Society of Florida  
ORLANDO, FL
- 23 Oriando Philharmonic Orchestra/The Plaza Live  
ORLANDO, FL
- 24 Early Learning Coalition of Northwest Florida  
PANAMA CITY, FL
- 25 Putnam County EDC  
PALATKA, FL
- 26 The Cultural Center of Ponte Vedra Beach  
PONTE VEDRA BEACH, FL
- 27 EDC of Florida's Space Coast  
ROCKLEDGE, FL
- 28 By the River, Inc.  
SEBASTIAN, FL
- 29 Sebastian River Area Chamber  
SEBASTIAN, FL
- 30 Air Force Enlisted Village  
SHALIMAR, FL
- 31 Council on Aging of Martin County at the Kane Center  
STUART, FL
- 32 Association of Early Learning Coalitions  
TALLAHASSEE, FL
- 33 Brogan Museum of Arts & Sciences  
TALLAHASSEE, FL
- 34 Early Learning Consortium  
TALLAHASSEE, FL
- 35 EDC of Tallahassee/Leon County  
TALLAHASSEE, FL
- 36 Florida Justice Technology Center  
TALLAHASSEE, FL
- 37 Corporation to Develop Communities of Tampa, INC.  
TAMPA, FL
- 38 Indian River Community Fdn.  
VERO BEACH, FL
- 39 School District of Indian River County  
VERO BEACH, FL
- 40 United Against Poverty  
VERO BEACH, FL
- 41 Visiting Nurse Assoc. & Hospice Foundation  
VERO BEACH, FL
- 42 3 to 5 Days  
WINTER PARK, FL
- 43 BASE Camp Children's Cancer Foundation  
WINTER PARK, FL
- 44 Global Peace Film Festival  
WINTER PARK, FL
- 45 Jewish Family Services  
WINTER PARK, FL
- 46 Nassau County EDB  
YULEE, FL



Contact Convergent For More Information On What We Can Do For Your Organization  
Call Us: 800-886-0280 | [www.ConvergentNonprofit.com](http://www.ConvergentNonprofit.com)