



HBCU Promise+ Legacy Program

REQUEST FOR PROPOSAL FOR DESTINATION MANAGEMENT & EVENT PLANNING CONTRACTORS

June 11, 2026

1. GENERAL INFORMATION.

- A. **Opportunity & Overview.** The Center for Community Self-Help (“Self-Help”) seeks to identify one or more destination management and event planning contract services to assist Self-Help in its services to HBCUs and for referrals to HBCUs for future direct services, as further described below.

This Request for Proposals (the “RFP”) will remain open at least until the deadline noted in Section 4D and responses (each a “Proposal”) will be evaluated as set forth in Section 4. Self-Help reserves the right to extend the submission period. For the purposes of this RFP, parties responding to this RFP are referred to as “Proposer” or you.

Proposals must be submitted electronically in accordance with Section 4 below.

- B. **Background: Self-Help as a Trusted Partner in Preserving HBCU Assets.** As the largest Black-run institutions and employers in many cities, Historically Black Colleges and Universities (HBCUs) are essential institutions—educational anchors, economic engines, and cultural beacons—especially in Black communities. Yet, many face serious financial threats: rising costs, underfunding, small boards, and limited political support. Recent federal actions limiting education spending and the prospect of further lost financial and goodwill support puts HBCUs at existential risk institutionally, puts the people who work at and benefit from these institutions at personal economic risk, and jeopardizes the stability of communities that could lose access to a significant pathway to economic mobility, public health and healthcare, and education. Half of all remaining HBCUs are private and face acute precarity should access to public funds become more restricted. While the entire HBCU educational sector is at risk of financial hardship, closure, merger, or accreditation risk, the risk is especially acute for private HBCUs, which are more tuition-dependent (i.e., 30% of private college revenues come from tuition versus 16% for public colleges)—and thus, less elastic to changes in enrollment—and have fewer financial buffers. From a people perspective, the risks are particularly acute for students who are first generation to attend college and those whose families have low wealth, as well as private HBCUs. Despite these challenges, hope remains. Application rates have climbed, and demographic trends show promising potential (e.g., U.S. Census (2022) and IES projections that K-12 students of color will be the majority of college-aged young adults shortly; untapped demand achieved by closing the gender gap in Black student college enrollment). More Black and non-White students may choose HBCUs for their affirming cultural environments and capital

maximization mission (Silvanus Wilson, 2023). The question now is how to support HBCUs in surviving and thriving to capitalize on the demand. Self-Help is well positioned to support this future.

Why Self-Help has extended its HBCU Promise+ Center of Excellence efforts. Self-Help is a family of affiliated nonprofits, which includes the Center for Community Self-Help, Self-Help Credit Union, Self-Help Federal Credit Union, Self-Help Ventures Fund, and the Center for Responsible Lending. Self-Help has a 45-year history committed to our mission: to create and protect ownership and economic opportunity for all, especially people of color, women, rural residents and low-wealth families and communities.

To achieve mission impact, Self-Help staffers engage in community-based advocacy (e.g., against payday lending, supporting consumer protections), partnership, and ecosystem lending to disrupt economic inequalities. As a family of nonprofits, we have provided over \$12 billion in financing to help more than 170,000 borrowers buy homes, start businesses, and strengthen community resources. Self-Help now has credit union branches in 10 states – four of which have the largest numbers of HBCUs and HBCU students in the country (i.e., NC, GA, SC, FL). Furthermore, Self-Help branches are located within a 30-minute drive from 22 HBCUs! This means that HBCU communities are our communities – they are the communities we aim to serve.

Ownership and economic opportunity depend on education, financial literacy, and capital access. Self-Help launched the HBCU Promise+ Initiative in 2021 to expand the range of affordable resources available to HBCU community members as well as the pathways available for career exploration, financial literacy, and advocacy. We also listened to HBCU Presidents who told us that they need: (a) access to affordable capital for projects and operating expenses; (b) technical assistance that extends their capacity for long-term strategic innovation, growth, and advancement management; and (c) support amplifying pathways to ownership for their stakeholders. In 2025, Self-Help expanded the initiative with the HBCU Promise+ Center of Excellence and its HBCU Legacy Program 3-part programmatic focus:

Purpose. Self-Help is a recipient of a grant from the Robert Wood Johnson Foundation (“RWJF Grant”) to support the preservation of HBCU campus assets and the ongoing legacy of these storied institutions, undertaken under the Self-Help HBCU Promise+ Legacy Program. Self-Help seeks to formally engage a select set of destination management and event planning contractors to support the advanced planning and onsite coordination of four (4) place-based HBCU Cohort convenings as well as a select set of virtual gatherings (estimated four (4)) for the HBCU Legacy Program cohort participants (“HBCU Cohort”) over the course of a 2-year program launch. Destination and event planning services may be related to group travel, hotel accommodations, ground transfers, coordination of community and HBCU Cohort-based meetings spaces, audio/visual as well as food and beverage meeting needs and support of marketing and promotion efforts related to the convenings, as outlined below in in Section 2.

Self-Help expects to use proceeds from the RWJF Grant to pay for all or a portion of the destination management and event planning services and related fees in accordance with any terms of such grant and all other applicable requirements.

- C. **Limitation.** Self-Help reserves the right to (a) reject any or all Proposals without explanation, (b) waive technicalities or irregularities, (c) request additional information from any Proposer (including a list of client references), (d) withdraw or revise this RFP at any time, (e) make such selection deemed in its best interest (in Self-Help's sole and exclusive discretion), and/or (f) enter into due diligence discussions with multiple successful Proposers. Upon completion of due diligence review, Self-Help may negotiate individual contracts with certain selected Proposers following counterparty review and based on program fit, not necessarily the lowest pricing.

The issuance of this RFP does not commit Self-Help to participate in any transaction, proceed to negotiate any terms or definitive documentation, pay any costs incurred in preparing a Proposal or to procure or contract for services or supplies. The selection of your Proposal under this RFP does not commit Self-Help to enter into an agreement or conduct or expand business with any Proposer even if all the requirements are met.

Self-Help anticipates beginning receipt of services upon completion of the RFP process and execution of a written agreement between Self-Help and successful Proposer.

2. **SCOPE OF SERVICES.** Selected Proposers will provide Self-Help with the following services, estimating approximately 40 persons attending each convening, including 15 representatives from HBCU Cohort schools, Self-Help staff members, and invited partners:

- **Pre-Event Travel coordination**
 - Hotel accommodations and ground transfers
- **Pre-Event Program and Agenda Management**
 - Assistance with developing and refining the event agenda
 - Speaker and panelist coordination, including logistics, prep, and briefings production support
- **Pre-Event and Onsite Vendor and Contract Management**
 - Procurement and oversight of third-party vendors
 - Audio/visual, space setup, and food and beverage coordination
 - Contract negotiation and compliance monitoring
 - Budget tracking and cost-control support
 - Coordination of onsite vendor arrivals, setup and breakdown, and coordination
- **Onsite Registration and Participant Management**
 - Creation and management of online registration platforms
 - Attendee communication, reminders, and updates
 - Meeting space coordination – community and HBCU Cohort campus-based spaces
 - Onsite check-in staffing and attendee support
- **Pre-Event and Onsite Cultural, Community, and VIP Coordination and Protocols**
 - Coordination of campus or community engagement activities
 - Protocol support for trustees, senior administration, elected officials, or VIP guests
 - Curated cultural experiences that reflect the local HBCU ecosystem
 - Entertainment booking
 - Tour and Excursion Planning
 - Design of optional learning journeys, site tours, or partner visits

- Logistics management for offsite experiential sessions
- **Pre-Event and Onsite Marketing and Promotion**
 - Support promotion efforts and opportunities related to the convening, including signage, collateral creation, etc. in coordination with designated Marketing & Communications experts and staff members
 - **Marketing** photography and videography procurement, vendor coordination, and speaker/guest coordination for collateral capture
 - **Post-Event Support**
 - Post-event reporting, including analytics and participant feedback
 - Media asset organization (photos, video, testimonials)
 - Debrief coordination with your team and partners
3. **PROPOSAL CONTENTS.** The Proposer shall clearly and concisely respond to each of the following subsections (referencing the corresponding section A-H). Failure to respond to a topic may render the Proposal incomplete and Self-Help reserves the right, in its sole discretion, to either contact Proposer to request supplementation of the Proposal or refuse to consider or evaluate the incomplete proposal.
- A. **Qualifications & Experience.** Describe your qualifications and experience related to the areas outlined in the Scope of Services above in Section 2, and Minimum and Preferred Qualifications below in Section 3. Include metrics that demonstrate the range and scope of your team's expertise and experience in provision of the services in Section 2 above, e.g., number of clients, anonymized description of the nature of the destination management and event planning client engagement(s), capacity, and timeline. Special attention should be given to enumerating the experiences related to colleges/universities and other social enterprises or nonprofit entities.
- B. **Organization, Size, Structure.** The Proposer should briefly describe its organization in terms of the following:
- Overall size and number of staff within Proposer organization specializing in relevant areas of expertise. Please include in the submission:
 - Description of staff's qualifications and roles
 - Description of customer service model, including methods of communication with clients
 - Relevant office locations
 - Major business relationships (within the last 3 years) relevant to the Services sought
 - Other details you deem reasonable and material for evaluating the Proposal.

Self-Help encourages the participation of businesses owned by people of color, women, and persons with disabilities in the implementation and execution of all projects, either on a direct basis or through sub-contracting efforts.

Please confirm whether you are aware of any actual or apparent conflict of interest arising from this proposed engagement.

- C. **Minimum Qualifications.** Document how you meet the following qualifications.

Required

- Capacity to support advance destination and event needs

- Capacity to provide at least 1 staff member onsite during convenings
- Licensing, capacity, and expertise to service North Carolina and South Carolina convenings
- Billing management in accordance with the requirements as a subcontractor under the RWJF Grant
- Annual compliance with business requirements in North Carolina and/or South Carolina
- Monthly reporting for all HBCU Cohort engagement types and billing bases

Preferred

- Capacity to either directly manage travel arrangements (e.g., air, train) or to subcontract with a trusted and approved travel service provider
- Capacity to provide at least 2 staff members onsite during convenings
- Licensing, capacity, and expertise to service convenings in other locations, e.g., Virginia, Maryland, Martha's Vineyard, etc.
- Dedicated relationship manager for HBCU Cohort advisory services

- D. **Pricing.** Describe your pricing and structure. Pricing should be within the standard industry ranges for each item, including any billing minimums and billing bases, any periodic minimum fees, and any other fees.
- E. **Cybersecurity and Breaches.** The Proposer should disclose and concisely describe its cybersecurity policies and procedures to protect client data. If the Proposer has suffered any known cyberattacks or breaches, please describe the event and the organization's response and remedial actions taken. Please include a copy of your Data Privacy and Cybersecurity Policy.
- F. **Insurance.** Describe the levels of coverage for liability insurance, cyber insurance, Financial Institution Bond (or equivalent insurance), Errors and Omissions Insurance, and any other relevant insurance your organization maintains.
- G. **Debarment or Suspension.** Confirm that neither your organization nor any individual who will be acting as a Principal on any contract entered as a result of the RFP has been suspended from or is ineligible for service provider in North Carolina and/or South Carolina, any State or Federal assistance program.
- H. **Contact Information.** The Proposer should include the name, title, mailing address, email address, and telephone number for the primary point of contact of the Proposer.

For all signatures, please use an electronic image of a wet signature (e.g. a scanned pdf) or a digital signature.

4. PROPOSAL EVALUATION

- A. **Submission of Proposals.** Submit Proposal, including all supporting documentation, electronically in a single PDF of 50 pages or less, plus required attachments to: shandra.jones@self-help.org. Include the RFP name and your organization name in the subject line of the submission email.

Self-Help is not responsible for electronic files that cannot be opened or corrupted files. If files cannot be opened, Self-Help reserves the right (but does not have the obligation) to contact the

Proposer and take reasonable measures to receive an openable file. Submissions must not be password protected or have any type of restriction applied to the file or contents. By submitting information, the Proposer represents that they have read and clearly understand this RFP and are capable of providing the required services.

All costs incurred in the preparation of a proposal responding to this RFP and/or participating in any interview process will be the responsibility of the Proposer and will not be reimbursed.

- B. **Evaluation Procedure and Criteria.** Self-Help will review proposals against initial criteria, including:
- a. First-tier evaluation metrics:
 - Responsiveness to RFP
 - Prior relevant experience
 - Operational processes (such as customer service model, third-party reviews and brand reputation, document and privacy protection protocols)
 - Reporting capabilities
 - Price reasonableness
 - b. Second-tier evaluation metrics
 - Interviews (if conducted)
 - Potential reference checks following interviews and
 - Publicly available information and Reputational Risk

Self-Help will review all Proposals based on first-tier evaluation metrics, and based on that review, may select a smaller number of Proposals for second-tier evaluation metrics. Any evaluation or scoring of first-tier or second-tier evaluation metrics is subject to correction upon discovery or disclosure of additional or clarifying information. All responses must be presented economically and efficiently. Self-Help may request additional due diligence materials and interviews with the Proposer as part of the selection process. Self-Help's decision regarding this RFP will be final and not subject to review.

- C. **Terms of Engagement.** Self-Help intends for this RFP to result in the selected Proposer executing a written agreement with Self-Help. The contract will be on a lump sum, fixed price, or cost reimbursement ("not to exceed") basis, with payment terms to be negotiated with the selected Proposer. Any such agreements with the selected Proposer will (a) be contract agreements, not subrecipient agreements, (b) comply with the requirements set forth for regulated mission-based financial institutions and CDFIs, and (c) be for a term of one year, with option for renewal for up to an additional one individual year, or as otherwise mutually agreed. Proposers must be amenable to including in a contract any information provided in its response to this RFP or developed subsequently during the selection process. The selected Proposer agrees to be bound by all applicable Federal, state, and local laws, regulations, and directives in the performance of such contract.
- D. **Timeline.** Self-Help expects to select the initial set of consultants in June 2026, with any subsequent consultants selected during Summer and Fall 2026. Self-Help may extend timelines set forth with respect to this RFP (but not shorten) in its sole discretion. Proposals submitted will be acknowledged and next steps communicated within two weeks.

Release of RFP	June 11, 2026
RFP Proposals Due to Self-Help	Open – Submit proposals ASAP

5. QUESTIONS AND CONTACT INFORMATION

Please submit any questions, per the timeline specified above, concerning this RFP and include the name of the RFP and organization in the subject line, to the following email address:

shandra.jones@self-help.org.

Direct communication about the content of this RFP will be limited. Self-Help will receive written questions from potential Proposers submitted via email. If appropriate, and for clear and consistent communication, the question (without identification of the questioner) and its answer will be posted to the FAQ on our website here: <https://www.self-help.org/who-we-are/resources/current-proposal-requests>.

Self-Help reserves the right not to respond to all questions. Each Proposer is responsible for requesting further explanation, if they do not fully understand or believe the information contained herein could be interpreted in more than one way.

Self-Help looks forward to receiving your Proposal.

END OF DOCUMENT