



Request for Proposals

Leadership Tulsa is an award-winning 501(c)3 not-for-profit corporation, with a mission to identify, develop and connect diverse leaders who impact the community through service.

Leadership Tulsa will be celebrating our 50th Anniversary in 2023. We have grown exponentially over the life of the organization, now with multiple important leadership development programs, several paid professional staff, and a very long list of alumni and active members. We are currently in the process of finalizing a move into a much larger physical space that will create a Leadership Center.

As the organization grows, it was determined that a new Leadership Tulsa Investment Strategy is needed to maintain the financial health of the organization. Leadership Tulsa is seeking an Investment firm that will enhance the financial sustainability of the organization.

Request for Proposals

This is a Request for a Proposal issued on behalf of Leadership Tulsa. This information must be submitted to Wendy Thomas by 5:00 p.m. on **February 14**. Submissions must be electronic and should be sent to wendy@leadershiptulsa.org. All responses received will be the property of Leadership Tulsa and will not be returned.

If clarifications are needed to interpret this RFP, please contact Wendy Thomas no later than noon on **February 10**. No information provided verbally or by any other personnel will be considered binding. All respondents should use this written document and all attachments as the sole basis of the RFP. An award may be made without discussion with the respondents.

Leadership Tulsa reserves the right to request additional information as may reasonably be required to make this determination and to further investigate the qualifications of the respondent and see additional work samples as deemed appropriate.

Investment Management

At the completion of our growth campaign, Leadership Tulsa anticipates reserves of more than \$250,000 and less than \$750,000 that will need invested.

Services needed will include, but will not be limited to:

- Short and Long Term Investments
- Growth Strategy
- Investment Strategy & Policy

Scope of Request

The following information must be included in your submission. Supplemental materials providing additional information may be attached.

- Name and contact information for the individual/organization/firm making the submission.
- Background, history or mission of the responder
- Options for low to moderate risk investment plan with expected yields
- Fees
- References (especially from other nonprofit clients)

Selection Criteria

Leadership Tulsa, guided by the finance committee, will consider multiple criteria including affordability, investment strategy, risk assessments, and congruence of organization values.

In conclusion, we are looking for an investment strategy that can assist with the operations and maintenance of the new Leadership Tulsa Center and the financial health of Leadership Tulsa.

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