



## The New York Wine & Grape Foundation

One Keuka Business Park, Suite 208  
Penn Yan, New York 14527  
(315) 924-3700 | [info@newyorkwines.org](mailto:info@newyorkwines.org)



### Request for Proposals Consultant for Organizational Analysis and Partnership Development June 25th, 2024

#### I. Organizational Background Information

The New York Wine & Grape Foundation (NYWGF) was created by the State of New York in 1985 as a private, non-profit organization. The enabling legislation established a financing mechanism for promotion and research, providing the New York Wine industry with both short-term assistance and the potential for long-term viability.

NYWGF's programs are developed by a Board of Directors in consultation with other representatives from industry and state government. The activities carried out by NYWGF are designed to support New York-grown wine and grapes from all regions of the state.

The mission of the NYWGF is to "promote the world-class image of New York grapes and wines from our diverse regions to responsibly benefit farmers, producers and consumers through innovative marketing, research, communication, and advocacy." The vision of the NYWGF is "to be the world's premier region for cool and cold climate viticulture."

Established in October of 1982, the Finger Lakes AVA (American Viticultural Area) is the largest wine-growing region in New York State. The Finger Lakes Wine Alliance (FLWA) was founded in 2001 and incorporated in 2004. Since its inception, the FLWA has worked to increase the visibility and reputation of Finger Lakes wines. Through various marketing initiatives, FLWA has positioned the region as a world-class wine-producing area. According to a study by Cornell University, the Finger Lakes region is now recognized as one of the top wine regions in the United States, thanks in large part to the efforts of the FLWA.

As the Finger Lakes Wine Alliance celebrates its 20th anniversary, it is also looking to the future. FLWA is committed to adapting to these changes to ensuring that the Finger Lakes region remains a key player in the global wine market. With plans to expand its marketing strategy and initiatives, FLWA is preparing to lead the Finger Lakes to a promising future.

The mission of the Finger Lakes Wine Alliance is to increase the visibility and prominence of the Finger Lakes AVA, its wines, and wineries. The organization brings together industry leaders to move the wine region forward. FLWA is made stronger by its member wineries who support the FLWA programs.

#### II. History of NYWGF and FLWA Partnership

Staff and Board leaders from NYWGF and FLWA recognize that they share the mission of expanding market presence for Finger Lakes wines. More intentional collaboration and coordination of both organizations' programs and services will more effectively support the industry and secure the joint goal of positioning the Finger Lakes as a premium wine region in the minds of trade, media, and consumers.



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Leadership also recognizes a significant overlap in dues-paying members between the two organizations. As of May 31, 2024, 32 Finger Lakes Wineries were members of both organizations. Many wineries have inquired about the possibility of joint efforts between NYWGF and FLWA to a) save money for wineries by streamlining dues b) amplify the effectiveness of joint marketing initiatives and c) allow for increased investment in regional promotions to elevate the Finger Lakes region in the minds of key audiences.

In 2023, NYWGF and FLWA staff began to hold monthly meetings to ensure alignment of their activities and marketing activations. Key NYWGF staff attended an FLWA Board Meeting in October 2023 to discuss alignment opportunities. As a result, the two organizations submitted a successful joint grant proposal to a regional funder.

Funding has been designated to engage a **Consultant for Organizational Analysis and Partnership Development** to assist NYWGF and FLWA with a formal exploration of our infrastructure, programmatic, and fiscal alignment. To ensure the long-term success of the NYWGF and FLWA partnership, a third-party professional will be well-versed in designing strategic partnerships for nonprofits. By harnessing the expertise of a specialized facilitator, NYWGF and FLWA will navigate the complexities of enhanced collaboration with precision and foresight.

It is expected that the consultant will help pave the way for a more cohesive and efficient operational framework, benefiting both organizations and the wider winery community in the Finger Lakes region, and creating a model for future collaboration in other wine regions across the state.

### III. Scope of Services

#### Request for Proposals: Consultant for Organizational Analysis and Partnership Development

##### Introduction:

The New York Wine & Grape Foundation (NYWGF) and the Finger Lakes Wine Alliance (FLWA) are seeking a qualified consultant to assist in a comprehensive exploration and evaluation of our respective organizational infrastructures, programs, fiscal policies, and legal frameworks. The goal is to identify opportunities for alignment and collaboration that will enhance our collective impact on the Finger Lakes wine industry.

##### Scope of Work:

#### 1. Organizational Research and Evaluation:

- Conduct an in-depth analysis of both organizations, including a thorough review of financial records, legal documents, structural frameworks, and other relevant materials.
- Perform website audits to assess online presence and digital strategy.
- Gather insights through focus groups, surveys, and interviews with key personnel and stakeholders.



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### 2. Facilitation of Stakeholder Dialogue:

- Organize and facilitate discussions among key stakeholders from NYWGF and FLWA to explore potential synergies and best practices in partnership.
- Utilize findings from the organizational research to inform these dialogues and ensure they are productive and focused.

### 3. Development of Business Structure/Partnership Options:

- Based on the research and stakeholder input, propose various business structure and partnership models for consideration.
- Ensure that these options are tailored to the unique needs and strengths of NYWGF and FLWA.

### 4. Final Report and Best Practices Guide:

- Compile a comprehensive report detailing the findings of the research, stakeholder dialogues, and proposed partnership options.
- Develop a step-by-step guide outlining best practices for future partnerships with similar regional organizations in New York state, aimed at fostering long-term collaboration and success.

#### Submission Requirements:

Interested consultants are invited to submit a proposal that includes the following:

- A detailed approach and methodology for conducting the research and evaluation.
- A timeline for each phase of the project.
- Examples of similar projects completed, along with references.
- A budget proposal, including a breakdown of costs.

#### Deadline for Proposals:

Proposals must be submitted by **5pm EST, Friday, August 16th, 2024** Please direct any questions and submit proposals to [nywinepartners@nywgf.org](mailto:nywinepartners@nywgf.org).

We look forward to working with a consultant who shares our commitment to advancing the New York wine industry through strategic alignment and partnership.

In the planning and execution of these initiatives, the consultant shall maintain close communication with key staff of FLWA and NYWGF. The consultant shall manage all financial aspects of the program in accordance with NYWGF's contracting guidelines. The NYWGF receives grant funding, primarily from the regional and state entities for its U.S. Marketing Program. There are regulations within these grants on eligible and ineligible use of funds, and other limitations. NYWGF would work with the selected consultant to ensure an understanding of program regulations.



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#### IV. Resources

We are pleased to provide the following resources to educate consultants on the organizational structure in place for NYWGF and FLWA.

##### NYWGF –

- [2022 IRS 990](#)
- [Bylaws](#)
- [Membership Dues Structure](#)
- [Sample Member Newsletter/Marketing Update](#)
- [2023 Annual Report](#)

##### FLWA –

- [2022 IRS 990](#)
- [Bylaws](#)
- [Membership](#)
- [Newsletter to wineries](#)
- [Newsletter to partners](#)

#### V. Project Budget

The NYWGF and FLWA combined budget for the Consultant for Organizational Analysis and Partnership Development, inclusive of activities and consultant fees, is **\$25,000**. Consultants should provide NYWGF with a budget breakdown for their recommended strategy within the current budget constraints, including the appropriate activities denoted within the Scope of Services. Please note that your proposed consultant fees should fully account for all work required to execute all proposed activities.

#### VI. Evaluation of Proposal

There is no required format for the proposal, however proposals should be limited to **ten pages** and should include at a minimum:

- Company information including prior experience in structuring nonprofit alliances and any experience in agricultural, hospitality, or other comparable sectors.
- Experience with any regional, state, or federal grant programs, as well as staff capabilities/backgrounds.
- Proposed scope of work including consultant roles/responsibilities.
- Staffing for the NYWGF account, and any expected subconsultants, including capabilities and staffing in the various markets that make up this suggested scope.



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- Estimated budget for activities including breakdown of all associated fees and expenses.

NYWGF and FLWA leaders will independently review and evaluate each proposal and selection will be made based on the following criteria:

- Ability to meet or exceed requirements as set out in the scope of services.
- Adequacy and availability of professional level staffing.
- Credentials and related experience.
- Level of service and activity given the budget parameters provided.

### VII. Authority

The selected agency will work with the prior approval of NYWGF and FLWA for all program activities. All expenditures must fall within the program budget or must be pre-approved by NYWGF and FLWA.

### VIII. Discrimination Clause

NYWGF and FLWA are equal opportunity employers and do not discriminate based on race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, or marital/familial status. NYWGF and FLWA comply with all provisions of the U.S. government’s Executive Order 11246 dated September 24, 1965, and the rules, regulations, and relevant orders of the Secretary of Labor.

### IX. Instructions for Submitting Proposals

Proposals should be submitted electronically to:  
Valerie Venezia-Ros, Director of Programs and Marketing  
Email: [nywinepartners@nywgf.org](mailto:nywinepartners@nywgf.org)  
Phone: (518) 229-3765

Questions regarding this RFP should be directed to: [nywinepartners@nywgf.org](mailto:nywinepartners@nywgf.org) by August 2<sup>nd</sup>, 2024.

**All proposals are due by 5:00 PM EST on August 23rd, 2024.**

*NYWGF and FLWA reserve the right not to award a contract if in the opinion of the evaluators, no suitable proposal is received. NYWGF and FLWA are not liable for any costs associated with any company’s response to this RFP.*

### X. RFP Time – Subject to Change

RFP Open	June 25th, 2024
Questions Due to NYWGF	August 2nd, 2024
Q&A Document Provided	August 9th, 2024
Proposals Due	August 23rd, 2024
Interviews Conducted	Week of September 16th, 2024



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Successful Partner Announced	October 2nd, 2024
Final Product Provided to Partners	March 3rd, 2025